# Ethiopian TVET-System

## Water Supply and Sanitation Operation

## Level-III

## Based on Feb, 2017G.C. Occupational Standard

## Title: Provide and Promote Customer Service

## TTLM Code: EIS WSW2 TTLM 0620v1

**September, 2020**

# This Module includes the following Learning Guides

**LG 80:** Apply organizational customer service standards

LG Code: EIS WSW3 M20 LO1-LG-80

**LG 81:** Respond to customer needs and concerns

LG Code: EIS WSW3 M20 LO2-LG-81

**LG 82:** Contribute to customer service standards

LG Code: EIS WSW3 M20 LO3-LG-82

| Instruction Sheet-1 | LG 80: Applying organizational customer service standards |
|---|---|

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Checking the organization's plans, policies and procedures
- Explaining the features, benefits and application of the organization's products
- Applying the organization's processes for handling customer queries, complaints and disputes.
- Applying effective communication techniques with different types of customers and situations.
- Planning and participating in team and work activities to meet customer satisfaction and minimize inconvenience.
- Using available resources to meet customer requirements and services.

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Check the organization's plans, policies and procedures
- Explain the features, benefits and application of the organization's products
- Apply the organization's processes for handling customer queries, complaints and disputes.
- Apply effective communication techniques with different types of customers and situations.
- Plan and participating in team and work activities to meet customer satisfaction and minimize inconvenience.
- Use available resources to meet customer requirements and services.

**Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below
3. Read the information written in the "Information Sheets "1- 6". Try to understand what are being discussed.
4. Accomplish the "Self-checks 1,2,3,4,5 and 6" in each information sheets on pages 14,19,23,36,43 and 46.
5. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-checks).
6. If you earned a satisfactory evaluation proceed to "self-checks 1, 2,3,4,5 and 6 on pages 14,19,23,36,43 and 46. However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity.
7. After You accomplish Operation sheets and LAP Tests, ensure you have a formative assessment and get a satisfactory result; then proceed to the next LG.

| Information Sheet-1 | Checking the organization's *plans*, *policies and procedures* |
|---|---|

## 1.1. Introduction to customer service

"There is only one boss, and whether a person shines shoes for a living or heads up the biggest corporation in the world, the boss remains the same. It is the customer! The customer is the person who pays everyone's salary and who decides whether a business is going to succeed or fail. In fact, the customer can fire everybody in the company from the chairman (CEO) on down, and he can do it simply by spending his money somewhere else. Literally everything we do, every concept perceived, every technology developed and associate employed, is directed with this one objective clearly in mind – pleasing the customer."

### 1) Expand Your Definition of Service

How you define service shapes every interaction you have with your customers. Limited definitions of service based on an exchange of monies for goods or service misses the overall point of customer service. "Service" should provide the customer with more than a product or action taken on his/her behalf. It should provide satisfaction. In essence, the customer should walk away pleased at the result of the transaction – not just content but actually happy. A happy customer will continue to be a buying customer and a returning customer.

### 2) Who are Your Customers?

Customers, buyers and clients want to pay a fair price for quality service or products, and feel satisfied they have paid for a service/product and received what they have paid for in return. They also want someone to take care of them. They need someone to understand their needs and help answer them. They need someone to hold their hands and walk them through a process. Customer service starts with the ability to listen to the customer and find out through polite questioning what he/she needs or wants.

Customer service and contact with a client mean that the customer will be heard and his/her problems will not go unanswered or ignored. It also means getting to know your client, his/her likes-dislikes, ideas, background, etc.

The other most important aspect to do is to listen to what the customer is saying. If people do not understand what is motivating the customer, they will not be successful in handling them. Do research on customers, their habits, and what they want and expect.

Most customer service is defined by how a company or organization treats “external customers,” but there is “internal customer service” as well. While this manual mainly addresses “external customers,” expanding your definition of customer service to include co-workers will lead toward even greater success. Remember, the internal customer chain is just like the external, we are all customers both inside and outside the company or organization. As a Wall Street Journal article succinctly put it, “Poorly Treated Employees Treat Customers Just as Poorly.”

**3) Develop a Customer Friendly Approach**

One commonality among all companies or organizations that provide good service is the development of a system and attitude promoting customer friendly service. By “customer friendly” we mean viewing the customer as the most important part of your job. The cliché, “The customer is always right” is derived from this customer friendly environment. Two critical qualities to the “Customer Friendly Approach”:

- Communications
- Relationships

**4) *What Customer Service Means***

As mentioned earlier, customer service means providing a quality product or service that satisfies the needs/wants of a customer and keeps them coming back. Good customer service means much more – it means continued success, increased profits, higher job satisfaction, improved company or organization morale, better teamwork, and market expansion of services/products.

Think about it places where you enjoy doing business – stores, petrol stations, suppliers, banks, etc. Why, aside from the actual product or service they provide, do you like doing business with them? You probably find them courteous, timely, friendly, flexible, interested, and a series of other exemplary qualities. They not only satisfy your needs and help you in your endeavors but make you feel positive and satisfied. You come to rely on their level of service to meet your needs and wants.

On the other hand, let's review a business you dislike patronizing maybe even hate utilizing but, in some cases, do so out of necessity. Maybe it is the Police when you need a new driver's license or maybe it is the local store that carries a product you need but who offers lousy.

service when you purchase. In both of these cases we are willing to hypothesize that the customer experience is marred by long lines, gruff service, inefficient processing, impolite and unfriendly clerks or salespeople, lack of flexibility, and no empathy for your customer plight. In these cases, you feel abused, unsatisfied, and taken advantage of – in essence, your experience is wholly negative.

Unfortunately, in the cases we outlined above there is no competition for the services/products offered or you would gladly not consider using either the Ministry of Transport or the rude department store. This is the advantage of a monopoly on a good or service because in a competitive marketplace, the unsatisfied customer shops elsewhere.

Remember, good customer service results in consumer satisfaction and return customers and growth in business. Poor customer service, except for monopolistic strongholds, generally results in consumer dissatisfaction, lack of returning customers and dwindling business.

### 5) Professional Qualities in Customer Service

Professionals who constantly deal with customers (inside and outside the company) need to strive for certain qualities to help them answer customer needs. The professional qualities of customer service to be emphasized always relate to what the customer wants. After years of polling and market research, it turns out customers are constantly internalizing their customer service experience. While there are a multitude of customer needs, six basics need stand out**:**

- ✓ Friendliness – the most basic and associated with courtesy and politeness.
- ✓ Empathy – the customer needs to know that the service provider appreciates their wants and circumstances.
- ✓ Fairness – the customer wants to feel they receive adequate attention and reasonable answers.

- ✓ Control – the customer wants to feel his/her wants and input has influence on the outcome.
- ✓ Information – customers want to know about products and services but in a pertinent and time-sensitive manner.

It is also very important for customer service employees to have information about their product or service. Service providers who answer, “I don’t know” or “It is not my department” are automatically demeaned and demoted in the mind of the customer. These employees can end up feeling hostile as well as unequipped. Customers want information, and they disrespect and distrust the person who is supposed to have information but does not.

### A. Policies, Procedures, Plans, and Practices

#### I. Policies

Policies are "principles, rules, and guidelines formulated or adopted by an organization to reach its long-term goals" (**www.BusinessDictionary.com**). Policies are guiding principles about how business should be conducted, and they generally outline standards of conduct, conformity with legal responsibilities and guidelines, and consistent ways of handling situations. Policies should reflect the organization's mission and values.

**Should:**

- ✓ Be written in clear and simple language
- ✓ Include a clear statement of the reason for the policy
- ✓ Be approved by the Board of Directors, and include the date of approval on each policy
- ✓ Conform with all applicable laws (some policies may need legal review)

#### II. Procedures

Procedures are "the specific methods employed to express policies in action in day-to-day operations of the organization" (**www.BusinessDictionary.com**). It is extremely important that policies and procedures are consistent with each other. If a procedure contradicts a policy, neither the policy nor the procedure is valid. It is often suggested that procedures should be separate from policies, rather than included within policies, because procedures should be flexible and more easily changed than policies.

**Should:**

- ✓ Contain enough information so that a staff person knows what to do
- ✓ Be clearly written
- ✓ Conform to the requirements of any applicable policies and all relevant laws
- ✓ Be posted or distributed as specified in the relevant policy or procedure, and as common-sense dictates
- ✓ Be reviewed and revised as needed to meet the agency's changing needs and conditions (again, ensure that any changes maintain consistency with policy or other requirements)
- ✓ Refer to positions rather than to specific staff members by name, so that they don't have to be changed with each personnel change.

It is recommended that several people (with different levels of knowledge) review and critique new procedures to ensure clarity. Written procedures should provide enough information so that additional verbal instructions are not necessary.

### III. Plans

A plan differs from a set of procedures in that it is generally more specific as to who will do each task, and when it is to be done. Unlike a set of procedures, a plan may "name names" by identifying the people responsible for each item, and it should ordinarily include target dates and documentation of progress made. Many agencies have developed strategic plans, which often identify key objectives to be met over a specific time period, such as a year.

**Should:**

1. Include specific objectives and the tasks necessary to accomplish those objectives
2. Name the individuals or groups responsible for each task
3. Provide dates by which tasks will be completed
4. Specify how success will be measured or gauged, if appropriate
5. Indicate progress toward objectives

### IV. Practices

Practices are the way things are ordinarily done in a place of business. They may include formal procedures, but often they are the result of organizational culture and habits that have accumulated over time. They should be reviewed occasionally to determine whether they conform to the organization's mission, philosophy, policies, and formal procedures. Sometimes organizations "drift" into doing things in a particular manner that is not the most effective or ethical way of handling the situation.

### B. Handling customer complaints

At some stage your business is likely to receive a customer complaint. Dealing with it in a positive and constructive manner will help to keep your customers. In general customers who are unhappy with your product or service will not complain to you; but they will complain to others and take their business elsewhere. Managing customer complaints and resolving them quickly will result in improved business processes and repeat business.

#### I. Complaints handling policy

Develop a complaints handling policy. It should include reassuring customers that you value their feedback and you are committed to resolving their issues in a fair, timely and efficient manner. It should also:

- ✓ explain how customers can make a formal complaint
- ✓ identify the steps you will take in discussing, addressing and resolving complaints
- ✓ indicate some of the solutions you offer to resolve complaints
- ✓ inform customers about your commitment to continuous improvement

#### II. Complaints handling procedure

Once you have developed a policy you can create a procedure for handling complaints. A procedure will ensure complaints are dealt with the same way, every time. The procedure should be easy to understand and follow by all your staff. Your procedure could include the following steps**:**

**1. Listen to the complaint**

Thank the customer for bringing the matter to your attention. Apologise and accept ownership, don’t blame others and remain courteous.

**2. Record details of the complaint**

Go through the complaint in detail so you can understand exactly what the problem is. Keep records of all complaints in one central place or register. This will help you identify any trends or issues.

### 3. Get all the facts

Check that you have understood and recorded the details of the complaint correctly. Ask questions if necessary.

### 4. Discuss options for fixing the problem

Ask the customer what response they are seeking; it could be a repair, replacement, refund or apology. Decide if the request is reasonable.

### 5. Act quickly

Aim to resolve the complaint quickly. If you take a long time they tend to escalate.

### 6. Keep your promises

Keep the customer informed if there are any delays in resolving their request. Don't promise things that you can't deliver.

### 7. Follow up

Contact the customer to find out if they were satisfied with how their complaint was handled. Let them know what you are doing to avoid the problem in the future.

Make sure your staff are trained to follow your procedure when handling complaints and that they have the power to resolve issues as quickly as possible. Encourage your customers to provide feedback and complaints so that they let you know when there is a problem and give you the opportunity to resolve it. specific documents relating to customer service**:**

### C. service standards:

A **Standard of Service** (SoS) is used in Infrastructure Asset Management to define the service that a customer is entitled to receive. Examples (these are for water services) could be**:**

- water will be provided at a minimum pressure of 15m giving a flow of at least 9 liters per minute at the first tap;
- bursts will be repaired within 12 hours of notification;
- bacteriological quality will conform to WHO standards;
- a substantive response to complaints and queries will be made within 10 working days of receipt. They are used to:
  - ✓ inform customers of the services they are entitled to receive;
  - ✓ provide a foundation for the asset management plan;

- ✓ enable regulators to measure the performance of the organization;
- ✓ form the basis of the internal management information system.

Standards should be objectively measurable, so that performance can be audited effectively, and provide a sound foundation for Asset Management. The term "Levels of Service" (LoS) is used extensively in asset management planning as it enables a range of performance to be measured and recorded.

The basic system uses five grades which are generic and should not be amended:

- ✓ Grade 1 = excellent;
- ✓ Grade 2 = good;
- ✓ Grade 3 = adequate;
- ✓ Grade 4 = poor;
- ✓ Grade 5 = awful.

Grade 1 represents the aspiration that the organization seeks to provide; grade 2 or grade 3 is normally equivalent to the defined standard and grade 5 is formulated to represent the worst performance in the current provision of a service. An example (using the quality of treated effluent) would look like this:

- ✓ Grade 1 - excellent: 100% compliance with zero failures;
- ✓ Grade 2 - good: 98% compliance;
- ✓ Grade 3 - adequate: better than 95% compliance;
- ✓ Grade 4 - poor: less than 95% compliance;
- ✓ Grade 5 - awful: less than 80% compliance;

Whilst the basic 1 to 5 grading system is always unchanged (except for very minor modification), the detail is tailored to both the particular industry and the local circumstances. Here's a further example based on airline baggage:

- ✓ Grade 1 - excellent: 100% of passengers arrive with accompanying luggage;
- ✓ Grade 2 - good: at least 99.5% of passengers arrive with accompanying luggage;
- ✓ Grade 3 - adequate: at least 99% of passengers arrive with accompanying luggage;
- ✓ Grade 4 - poor: less than 99% of passengers arrive with accompanying luggage;
- ✓ Grade 5 - awful: less than 95% of passengers arrive with accompanying luggage;

Obviously, the numbers will differ according to the sophistication of the airline and its passengers' expectations but the principle remains the same. The levels of service, which are defined, all describe particular outcomes from the customers point of view - they do not refer to mechanical issues such as the output of a pump or the number of times the baggage handling system breaks down. In certain circumstances it may be necessary to define internal customers in order to break down the supply chain but these measures would normally only be used within the business. Where there is a lack of concrete issues, it can be appropriate to use satisfaction as the measure, based on a customer survey:

- ✓ Grade 1 - excellent: 100% of customers record complete satisfaction;
- ✓ Grade 2 - good: more than 95% record complete satisfaction;
- ✓ Grade 3 - adequate: more than 90% record complete satisfaction;
- ✓ Grade 4 - poor: less than 90% record complete satisfaction;
- ✓ Grade 5 - awful: less than 80% record complete satisfaction;

**D. dispute resolution processes:**

Dispute resolution processes fall into two major types: Adjudicative processes, such as litigation or arbitration, in which a judge, jury or arbitrator determines the outcome. Consensual processes, such as collaborative law, mediation, conciliation, or negotiation, in which the parties attempt to reach agreement. The most common types of Alternative dispute resolution (ADR) for civil cases are mediation, settlement conferences, neutral evaluation, and arbitration.

I. **Basic types of Dispute Resolution**

1. Mediation
2. Arbitration
3. Litigation

1. **Mediation**: is a dynamic, structured, interactive process where an impartial third party assists disputing parties in resolving conflict through the use of specialized communication and negotiation techniques. All participants in **mediation** are encouraged to actively participate in the process.
2. **Arbitration:** Is a neutral third party serves as a judge who is responsible for resolving the dispute. Arbitration is a procedure in which a dispute is submitted, by agreement

of the parties, to one or more arbitrators who make a binding decision on the dispute. In choosing arbitration, the parties opt for a private dispute resolution procedure instead of going to court.

3. **Litigation:** Litigation is a process for handling disputes in the court system. Litigation is a contested action, where someone else, such as a judge may make the final decisions for the parties unless the parties settle before trial. Settlement can happen at any point during the process.

The most common form of **alternative dispute resolution** authorized by the federal courts is mediation. At the present time, more than fifty federal trial courts authorize the use of mediation, with some relying on attorney mediators and magistrate judges.

There are three main types of formal alternative dispute resolution techniques that are commonly used in the United States. They include **mediation**, **arbitration** and collaborative law each of which will be discussed below. In **mediation**, an independent mediator works with the parties to come to a resolution.

**Dispute resolution** is a term that refers to a number of **processes** that can be used to resolve a conflict, **dispute** or claim. **Dispute resolution processes** are alternatives to having a court (state or federal judge or jury) decide the **dispute** in a trial or other institution decide the **resolution** of the case or contract.

- ✓ Avoiding. Someone who uses a strategy of "avoiding" mostly tries to ignore or sidestep the conflict, hoping it will resolve itself or dissipate.
- ✓ Accommodating.
- ✓ Compromising.
- ✓ Competing.
- ✓ Collaborating.

| Self-Check -1 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. The customer is the person who pays everyone's salary and who decides whether a business is going to succeed or fail. A. True B. True
2. "Service" should provide the customer with more than a product or action taken on his/her behalf. A. True B. True
3. Customer service and contact with a client mean that the customer will be heard and his/her problems will go unanswered or ignored. A. True B. False
4. "The customer is always right" is derived from this customer friendly environment. A. True B. False
5. Professionals who constantly deal with customers (inside and outside the company) not need to strive for certain qualities to help them answer customer needs. A. True B. False
6. From the six basics customer need, one is the most basic and associated with courtesy and politeness.
   A. Empathy
   B. Friendliness
   C. Fairness
   D. Information

7. _______ are "principles, rules, and guidelines formulated or adopted by an organization to reach its long-term goals".
   A. Plans
   B. Procedures
   C. Policies
   D. Practices
8. Policies should reflect the organization's mission and values. Which one?

A. Be written in clear and simple language
B. Not Include a clear statement of the reason for the policy
C. Be not approved by the Board of Directors

D. Conform without all applicable laws

9. One of the following is **not** used to manage customer complaints and resolving them.

   A. Complaints handling policy
   B. Listen to the complaint
   C. Incomplete Record of the complaint
   D. Complaints handling procedure

10. How many basic types of dispute resolution?

   A. 2
   B. 5
   C. 3
   D. 4

***Note:*** **Satisfactory rating ≥5 points** **Unsatisfactory <5points**

Answer Sheet-1

Name: ______________________ Date: ________________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

Score = ___________

Rating: ____________

| Information sheet -2 | Features, benefits and application of the organization's products and services to customers |
|---|---|

## 2.1. General organizational documentation

organizational documentation means;

- with respect to any corporation, its certificate or articles of incorporation or organization, as amended, and its by-laws, as amended,
- with respect to any limited partnership, its certificate of limited partnership, as amended, and its partnership agreement, as amended,
- with respect to any general partnership, its partnership agreement, as amended, and
- with respect to any limited liability company, its articles of organization, as amended, and its operating agreement, as amended.

In the event any term or condition of this Agreement or any other Credit Document requires any Organizational Document to be certified by a secretary of state or similar governmental official, the reference to any such "Organizational Document" shall only be to a document of a type customarily certified by such governmental official.

✓ **Mission Statements:**

A mission statement is a formal summary that explains what you do, how you do it and why you do it. A mission statement defines your cause-something you want to accomplish. A vision statement defines what you want to pursue for your cause-it represents the future aspirations of your efforts.

✓ **Mission Statement Examples**

1. **Uber:** We ignite opportunity by setting the world in motion.
2. **Google:** To organize the world's information and make it universally accessible and useful.
3. **Kickstarter:** To help bring creative projects to life.
4. **Tesla:** To accelerate the world's transition to sustainable energy.
5. **Life is Good:** To spread the power of optimism.
6. **Wawa:** Fulfilling Lives, Every Day.
7. **Squarespace:** Squarespace empowers people with creative ideas to succeed.

- **Vision Statement:**

A vision statement is a company's road map, indicating what the company wants to become by setting a defined direction for the company's growth. A good vision statement should be short, simple, specific to your business, leave nothing open to interpretation. It should also have some ambition. This comprehensive guide will take you through the entire process of writing a good vision statement, with examples and resources to help along the way.

✓ **How to Write A Vision Statement?**

1. Project five to ten years into the future.
2. Determine your purpose and position as an organization.
3. Describe what success looks like in your operations.
4. Consider your company type and structure.
5. Reference your competitors or create an analogy.
6. Describe a measurable goal.

✓ **What is the difference between a vision and mission statement?**

Organizations summarize their goals and objectives in mission and vision statements. Both of these serve different purposes for a company but are often confused with each other. While a mission statement describes what a company wants to do now, a vision statement outlines what a company wants to be in the future.

**2.1.1. Strategic and Annual Plans:**

The strategic plan identifies the framework for the organization on how to build and sustain programming over time. For the annual plan, organizations need to consider where they want programs to be within the next year and the strategic priorities shape those annual goals.

2.1.2. **Strategic planning value**

Align the management team on a strategic agenda to move the organization forward. Communicate clarity of direction throughout the organization. Provide clear direction and thereby restore integrity of leadership. Solve key performance problems. A strategic plan outlines your mission, vision, and high-level goals for the next three to five years. It also takes into account how you'll measure those goals, and the major projects you'll take on to meet them. A strategic plan consists of five key components: a vision statement, a mission statement, goals and objectives, an action plan, and details on how often the strategic plan will be reviewed and updated.

An annual plan is an organization's financial plan for the year. Of course, our annual audited financial statements to reflect restricted funding as well as non-cash revenue and expenses, in order to conform to generally accepted accounting principles.

Any example of a strategic plan must include objectives, as they are the foundation for planning. In this example, our objective is to increase client satisfaction from 82% to 90% by December 31st. How we accomplish that is the business of strategies and tactics.

- ✓ **6 Key Factors to Successful Strategic Planning**
  - ✓ Create a Collaborative and Inclusive Process.
  - ✓ Operate Off Data, Not Assumptions.
  - ✓ Set an Expectation for Shared Responsibility and Ownership.
  - ✓ Prioritize Transparent Communication.
  - ✓ Think Past the Strategic Plan.
  - ✓ Commit to Making Changes-Especially Leadership.
- ✓ **Levels of Strategy**

Strategy can be formulated at three levels, namely, the corporate level, the business level, and the functional level. At the corporate level, strategy is formulated for your organization as a whole. Corporate strategy deals with decisions related to various business areas in which the firm operates and competes.

- ✓ **The major parts of a standard strategic plan include the following:**
  - ✓ Mission, vision, and aspirations.
  - ✓ Core values.
  - ✓ Strengths, weaknesses, opportunities, and threats.
  - ✓ Objectives, strategies, and operational tactics.
  - ✓ Measurements and funding streams.

| Self-Check -2 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth two points.

1. Organizational documentation means;
   A. with respect to any corporation
   B. with respect to any general partnership
   C. with respect to any limited liability company
   D. All
2. Which of the following is **not** mission statement example?
   A. Google
   B. Square space
   C. Uber
   D. Map
3. How to Write A Vision Statement?
   A. Determine your purpose and position as an organization.
   B. Describe what success looks like in your operations.
   C. Describe a measurable goal.
   D. All
4. One of the following is **not** Key Factors to Successful Strategic Planning.
   A. Create a Collaborative and Inclusive Process.
   B. Operate Off Data, Not Assumptions.
   C. Not Prioritize Transparent Communication.
   D. Think Past the Strategic Plan.
5. The major parts of a standard strategic plan include:
   A. Mission and vision,
   B. Core values.
   C. Strengths and weaknesses
   D. All

***Note:*** **Satisfactory rating ≥5 points** **Unsatisfactory <5 points**

Answer Sheet-2

Name: ______________________ Date: ________________

Choice Questions

1.________ 2. ________ 3. ________4. ________5. ___________

Score = ___________

Rating: ____________

| Information sheet -3 | ***processes for handling customer queries**, **complaints and disputes**.* |
|---|---|

### 3.1. Handling Customer Complaints

In today's services-oriented industries, it is extremely important for employees to demonstrate a consistently high level of customer satisfaction skills. An important element of achieving this goal is the ability for every employee to handle and resolve customer complaints efficiently and effectively. Addressing client satisfaction issues and providing exemplary customer service is critical in every business environment from local restaurants and small companies to retail outlets and large corporations with extended call centers, customer service agents, and support staff.

A customer complaint often provides an opportunity for a company to learn about deficiencies in their product, process, or service delivery—and to take steps towards improvement. Handling consumer complaints properly and effectively, either in person, on the phone, or via email, often results in a happy client who will use your products or services again. And a satisfied customer is also likely to share their positive experience with others.

Likewise, a dissatisfied customer is highly likely to share their negative experience with friends, colleagues, and business associates. And in today's environment of social media outlets such as Facebook, Twitter, Instagram and a seemingly endless variety of online forums and blogs for sharing common complaints, a barrage of negative public criticism can quickly impact a company's image and bottom line. Here are seven tips to help you increase your skills for improving customer service.

### 3.1.1. Most Important Steps towards Handling Customer Complaints

**Step 1. Allow the Customer to Speak and Listen to Their Complaints**

After asking the customer to explain the nature of their complaint, do not interrupt them, which can increase their anger further, and lead to additional conflict. Allowing the customer to fully describe the reasons for their dissatisfaction is key to deflating and ultimately resolving their issues.

Even if the person is irate and yelling, do not take their comments personally. Try to remember that the customer is angry at the situation not at you personally and you are there to help address their concerns and to resolve the problem.

If angry a customer is not clearly describing their problem, try asking open-ended questions to draw out more usable information. Asking qualifying questions can have a calming effect as the irate person begins to understand that you are truly interested in their problem—and in trying to find a solution.

**Step 2. Ask If You Can Repeat the Complaints Using Your Own Words**

Asking for permission is a subtle but important step towards gaining the customer's trust in your willingness to address their concerns, and helps to ensure that they are now listening to you. Do not include their terms of frustration in your response, but summarize the list of problems including any specific details.

If you are not completely sure that you fully understand the customer's complaints, try asking probing questions that invite the customer to expand on the explanation of their issue. Be careful not to sound like you are challenging the customer or refuting the information that they have given you already; the goal is to gain more information so that you can better help the customer to resolve the problem.

**Step 3. Speak Calmly and Clearly**

When dealing with a customer over the phone, it is especially important to demonstrate your capability and professionalism, and your voice and demeanor are your best tools. Do not exhibit signs of uncertainty or nervousness. Even if the person is very irate, responding in a cool and collected manner is essential to defusing the situation.

**Step 4. Look at the Situation from the Customer's Perspective**

Put yourself in your customer's position, and try to empathize with their situation and their frustrations. Then, respond appropriately to their concerns. In many situations, an apology is appropriate on behalf of your company even if you did not have any personal involvement in the issue.

## Step 5. Take Responsibility for the Situation

An angry customer is looking to you for a resolution to their issues, and it is important to show them that you can assist them quickly and effectively. Unless it is absolutely unavoidable, do not infuriate the client further by transferring the call to another person in a different department.

If a call must be transferred, stay on the call until the other party answers, introduce the caller, and transition the situation. Do not just blindly transfer an angry caller if the call is forwarded to a voicemail box or gets disconnected, the customer will be even more irate when they call back.

**Step 6. Take Action**

Find out from the customer what they feel is an appropriate resolution to their problem. If their request is reasonable and within your area of authority, then provide a prompt solution for the customer. If the request is unreasonable, calmly explain your company's position and offer an alternative solution. In many instances, a credit, refund, or discount on a future purchase may satisfactorily resolve the issue for both parties.

If the request is reasonable but beyond your level of authority to approve, explain the approval process to the customer including the expected timeframe for a response. Be sure to gather the customer's contact information and their preferred method of communication (telephone number or email).

**Step 7. Follow Up**

After reaching a resolution, follow up afterward with the customer to ensure that the issue was resolved to their satisfaction. This small step is essential to verify that the issue is truly resolved, and often makes a huge difference in how the client feels about how their issue was addressed. This small step is worth the extra effort, and can often lead to repeat business and a loyal customer who will recommend your business to others.

| Self-Check -3 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. Water Quality Addressing client satisfaction issues and providing exemplary customer service is critical. A. True B. True
2. A customer complaint is not often providing an opportunity for a company to learn about deficiencies in their product, process, or service delivery and to take steps towards improvement. A. True B. True
3. After asking the customer to explain the nature of their complaint, do not interrupt them, which can increase their anger further, and lead to additional conflict. A.True B. False
4. Allowing the customer to fully describe the reasons for their dissatisfaction is not key to deflate and ultimately resolving their issues. A. True B. False
5. When dealing with a customer over the phone, it is especially important to demonstrate your capability and professionalism, and your voice and demeanor are your best tools. A. True B. False
6. An angry customer is looking to you for a resolution to their issues, and it is important to show them that you can assist them quickly and effectively. A. True B. False

***Note:* Satisfactory rating ≥3 points** **Unsatisfactory <3 points**

Answer Sheet-3

Name: ____________________ Date: _______________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________6. ________

Score = ___________

Rating: ____________

| Information sheet-4 | Effective Communication Techniques |
|---|---|

## 4.1. Effective Communication Techniques

In peer support, being part of group discussions is entering into a dialogue with other people. That means, effective communication in a group is not just about what you say and do, it includes being aware of what other group members contribute to the conversation.

Did you know that 65 per cent of what we communication is non-verbal? Non-verbal communication includes eye contact, the tone of your voice, your posture, your facial expressions and the way you move your body.

Below we have gathered tips for effective communication in a peer support group setting. Some relate to your verbal and non-verbal communication, while others relate to being aware of other members' verbal and non-verbal communication.

| | |
|---|---|
| **Eye contact** | Eye contact with the speaker helps them know that they have your attention and you are listening to what they have to say. |
| **Use people's names when speaking to them** | Using your group members' names when speaking to them helps to build rapport and reinforces a sense of belonging. |
| **Address group interaction issues or concerns early** | Be aware of what is going on around you. How are group members interacting and how have members reacted to group conversation? If you notice anything concerning, address it – reach out to the group member during a break or after the meeting or speak with your group facilitator if appropriate. |
| **One person speaks at a time** | Remind group members that only one person speaks at a time. You can use tools like a 'talking stick' to help facilitate this. Incorporating this expectation in to your group agreement means that if a group member interrupts persistently you can refer back to the group agreement. |
| **Keep conversations on a personal and feeling level** | When talking about feelings encourage people to use 'I' statements rather that 'you' and 'we' statements. Using 'I' statements gives the speaker ownership of their thoughts and feelings. |
| **Think about your body language** | Helpful non-verbal communication techniques include affirmative movements such as nodding your head or smiling, leaning slightly forward in your chair and uncrossing your arms. These all indicate you are actively listening to the speaker. |
| **Be aware of what you contribute to the group** | Think about what you bring to the group. Do you share your ideas and contribute to group discussions? Do you give others the space to speak or do you tend to dominate conversation? Take some time to reflect on how you are contributing to the group. |

Effective communication is about more than just exchanging information. It's about understanding the emotion and intentions behind the information. As well as being able to clearly convey a message, you need to also listen in a way that gains the full meaning of what's being said and makes the other person feel heard and understood.

Effective communication sounds like it should be instinctive. But all too often, when we try to communicate with others something goes astray. We say one thing, the other person hears something else, and misunderstandings, frustration, and conflicts ensue. This can cause problems in your home, school, and work relationships.

For many of us, communicating more clearly and effectively requires learning some important skills. Whether you're trying to improve communication with your spouse, kids, boss, or coworkers, learning these skills can deepen your connections to others, build greater trust and respect, and improve teamwork, problem solving, and your overall social and emotional health.

### 4.1.1. Common barriers to effective communication include:

- ✓ **Stress and out-of-control emotion.** When you're stressed or emotionally overwhelmed, you're more likely to misread other people, send confusing or off-putting nonverbal signals, and lapse into unhealthy knee-jerk patterns of behavior. To avoid conflict and misunderstandings, you can learn how to quickly calm down before continuing a conversation.
- ✓ **Lack of focus.** You can't communicate effectively when you're multitasking. If you're checking your phone, planning what you're going to say next, or daydreaming, you're almost certain to miss nonverbal cues in the conversation. To communicate effectively, you need to avoid distractions and stay focused.
- ✓ **Inconsistent body language.** Nonverbal communication should reinforce what is being said, not contradict it. If you say one thing, but your body language says something else, your listener will likely feel that you're being dishonest. For example, you can't say "yes" while shaking your head no.
- ✓ **Negative body language.** If you disagree with or dislike what's being said, you might use negative body language to rebuff the other person's message, such as crossing your arms, avoiding eye contact, or tapping your feet.

### 4.1.2. Effective communication skills

- ✓ **Skill 1: Become an engaged listener**

When communicating with others, we often focus on what we should say. However, effective communication is less about talking and more about listening. Listening well means not just understanding the words or the information being communicated, but also understanding the emotions the speaker is trying to convey.

There's a big difference between engaged listening and simply hearing. When you really listen when you're engaged with what's being said you'll hear the subtle intonations in someone's voice that tell you how that person is feeling and the emotions they're trying to communicate. When you're an engaged listener, not only will you better understand the other person, you'll also make that person feel heard and understood, which can help build a stronger, deeper connection between you.

By communicating in this way, you'll also experience a process that lowers stress and supports physical and emotional well-being. If the person you're talking to is calm, for example, listening in an engaged way will help to calm you, too. Similarly, if the person is agitated, you can help calm them by listening in an attentive way and making the person feel understood.

If your goal is to fully understand and connect with the other person, listening in an engaged way will often come naturally. If it doesn't, try the following tips. The more you practice them, the more satisfying and rewarding your interactions with others will become. Perfecting your communication skills is important in any situation, check out the tips below for effective communication when dealing with a complaint.

**1. Understand the complaint.** Before you answer an angry customer, show that you have understood the problem of that customer. If the customer has explained his or her complaints you only need to repeat the problem and find a solution. If the customer complaints in writing, quote the words of the customer to show that you have carefully read their letter of complaint. Record all the relevant data with the customer in question like date of purchase, account number, previous contact with customer service, etc. If you still do not understand the problem, read tip number

**2. Ask for clarification.** An angry customer might be unable to write their complaint clearly. You can ask the customer to clarify the problem: did the customer receive a broken product or did the customer receive the wrong product? You can also ask how the customer wants the problem to be solved. Does the customer want the product to be replaced or does he or she want his or her money back? If you cannot clarify the problem and offer the right solution, you can make the customer angrier.

**3. Personalize the response to the customer.** An angry customer will not be able to cool down if he or she feels that no one is there to listen to his or her complaint. Respond with the following: "Dear customer, thank you for your letter. We will solve your problem and we are happy to hear from you about it." So send a personal letter to convince them that their complaint has been recorded clearly. Always use the name of the customer and do not forget their gender and titles. Repeat the information from your company and integrate that with your message. "We are proud that you have selected us as your provider for six years and we want to continue serving you as our valued customer." Personalize your message with your name. The customer needs to know that there is a human being who trying to solve his or her problem.

**4. Say that you will solve the problem as soon as possible.** An angry customer just needs concrete actions. So you need to specify how you are going to solve the problem of that angry customer. If the solution is complex break it down into steps which are understandable. If possible, state when the problem will be solved. "We will send your new order tonight and it will be delivered to you at 10 am." Or "We are going to check the shipment of your order right now to find out what went wrong."

**5. If delivering a good message, say it first.** If you can make a customer happy, deliver the good message first and then show empathy. Good message: "We will refund your money with pleasure as you requested." Empathy:" We fully understand your frustration because you received your Christmas gift after Christmas." However, if you cannot make the customer happy because you have to say "no" to the customer, show empathy first and then deliver the "bad news." Empathy: "We understand your frustration because you received the Christmas present after Christmas." Bad news: "We cannot refund your money because your order has passed the last date of our product warranty."

**6. Use positive and polite tone.** You might be tempted to use answer customer complaints with a similar harsh tone: "You have dropped your camera and it is not covered by our product warranty." Try not to make the problem worse by using the wrong tone because you will be flooded by more angry responses. Use polite and positive words: "Your camera seems to be broken because you dropped it and we are sorry to respond that we cannot replace it because our warranty only covers losses due to manufacturing mistakes."

**7. Avoid blaming the customer.** Try to replace all the "your" words with "I" or "we." Do not say or write: "We cannot process your order because you did not mention your address on the purchasing order form." Say or write: "We cannot process your order because we do not have your address."

**8. Recognize the customer's frustrations.** Maybe the customer's problem is not caused by your company or maybe you cannot solve the problem. But you can imagine the frustration of your customer. Empathize with your customer: "We know that whatever caused our server to malfunction has already caused problems at your office."

**9. Apologize when you made a mistake.** When your company made a mistake, apologize. Make your apology specific. Avoid saying: "We are sorry that you are confused due to your credit application." Instead say: "We apologize for putting the wrong date on your application. We will amend this error immediately."

**10. Satisfy your customer by offering something valuable.** If your company's policy allows you to give discounts, products, or gifts to angry customers, you can say: "We will give a 50 percent discount if you buy a new camera." Customer complaints in written form are more difficult to handle. You will not have the opportunity to hear or see the customer. It is still very important you handle the complaint professionally.

- **Skill 2: Pay attention to nonverbal signals**

The way you look, listen, move, and react to another person tells them more about how you're feeling than words alone ever can. Nonverbal communication, or body language, includes facial expressions, body movement and gestures, eye contact, posture, the tone of your voice, and even your muscle tension and breathing.

Developing the ability to understand and use nonverbal communication can help you connect with others, express what you really mean, navigate challenging situations, and build better relationships at home and work.

- ✓ You can enhance effective communication by using open body language—arms uncrossed, standing with an open stance or sitting on the edge of your seat, and maintaining eye contact with the person you're talking to.
- ✓ You can also use body language to emphasize or enhance your verbal message—patting a friend on the back while complimenting him on his success, for example, or pounding your fists to underline your message.

- **Improve how you *read* nonverbal communication:**

- ✓ **Be aware of individual differences.** People from different countries and cultures tend to use different nonverbal communication gestures, so it's important to take age, culture, religion, gender, and emotional state into account when reading body language signals. An American teen, a grieving widow, and an Asian businessman, for example, are likely to use nonverbal signals differently.

- ✓ **Look at nonverbal communication signals as a group.** Don't read too much into a single gesture or nonverbal cue. Consider all of the nonverbal signals you receive, from eye contact to tone of voice to body language. Anyone can slip up occasionally and let eye contact go, for example, or briefly cross their arms without meaning to. Consider the signals as a whole to get a better "read" on a person.

- **Improve how you *deliver* nonverbal communication:**

- ✓ **Use nonverbal signals that match up with your words** rather than contradict them. If you say one thing, but your body language says something else, your listener will feel confused or suspect that you're being dishonest. For example, sitting with your arms crossed and shaking your head doesn't match words telling the other person that you agree with what they're saying.
- ✓ **Adjust your nonverbal signals according to the context.** The tone of your voice, for example, should be different when you're addressing a child than when you're addressing a group of adults. Similarly, take into account the emotional state and cultural background of the person you're interacting with.
- ✓ **Avoid negative body language.**

Instead, use body language to convey positive feelings, even when you're not actually experiencing them. If you're nervous about a situation a job interview, important presentation, or first date, for example you can use positive body language to signal confidence, even though you're not feeling it. Instead of tentatively entering a room with your head down, eyes averted, and sliding into a chair, try standing tall with your shoulders back, smiling and maintaining eye contact, and delivering a firm handshake. It will make you feel more self-confident and help to put the other person at ease.

- **Skill 3: Keep stress in check**

How many times have you felt stressed during a disagreement with your spouse, kids, boss, friends, or coworkers and then said or done something you later regretted? If you can quickly relieve stress and return to a calm state, you'll not only avoid such regrets, but in many cases, you'll also help to calm the other person as well. It's only when you're in a calm, relaxed state that you'll be able to know whether the situation requires a response, or whether the other person's signals indicate it would be better to remain silent.

In situations such as a job interview, business presentation, high-pressure meeting, or introduction to a loved one's family, for example, it's important to manage your emotions, think on your feet, and effectively communicate under pressure.

- ✓ **Use stalling tactics** to give yourself time to think. Ask for a question to be repeated or for clarification of a statement before you respond.
- ✓ **Pause to collect your thoughts**. Silence isn't necessarily a bad thing pausing can make you seem more in control than rushing your response.
- ✓ **Make one point** and provide an example or supporting piece of information. If your response is too long or you waffle about a number of points, you risk losing the listener's interest. Follow one point with an example and then gauge the listener's reaction to tell if you should make a second point.
- ✓ **Deliver your words clearly.** In many cases, how you say something can be as important as what you say. Speak clearly, maintain an even tone, and make eye contact. Keep your body language relaxed and open.
- ✓ **Wrap up with a summary** and then stop. Summarize your response and then stop talking, even if it leaves a silence in the room. You don't have to fill the silence by continuing to talk.

- **Quick stress relief for effective communication**

When a conversation starts to get heated, you need something quick and immediate to bring down the emotional intensity. By learning to quickly reduce stress in the moment, you can safely take stock of any strong emotions you're experiencing, regulate your feelings, and behave appropriately.

- ✓ **Recognize when you're becoming stressed.** Your body will let you know if you're stressed as you communicate. Are your muscles or stomach tight? Are your hands clenched? Is your breath shallow? Are you "forgetting" to breathe?
- ✓ **Take a moment to calm down** before deciding to continue a conversation or postpone it.

- ✓ **Bring your senses to the rescue.** The best way to rapidly and reliably relieve stress is through the senses—sight, sound, touch, taste, smell—or movement. For example, you could pop a peppermint in your mouth, squeeze a stress ball in your pocket, take a few deep breaths, clench and relax your muscles, or simply recall a soothing, sensory-rich image. Each person responds differently to sensory input, so you need to find a coping mechanism that is soothing to you.
- ✓ **Look for humor in the situation.** When used appropriately, humor is a great way to relieve stress when communicating. When you or those around you start taking things too seriously, find a way to lighten the mood by sharing a joke or an amusing story.
- ✓ **Be willing to compromise.** Sometimes, if you can both bend a little, you'll be able to find a happy middle ground that reduces the stress levels for everyone concerned. If you realize that the other person cares much more about an issue than you do, compromise may be easier for you and a good investment for the future of the relationship.
- ✓ **Agree to disagree,** if necessary, and take time away from the situation so everyone can calm down. Go for a stroll outside if possible, or spend a few minutes meditating. Physical movement or finding a quiet place to regain your balance can quickly reduce stress.

**Skill 4: Assert yourself**

Direct, assertive expression makes for clear communication and can help boost your self-esteem and decision-making skills. Being assertive means expressing your thoughts, feelings, and needs in an open and honest way, while standing up for yourself and respecting others. It does NOT mean being hostile, aggressive, or demanding. Effective communication is always about understanding the other person, not about winning an argument or forcing your opinions on others.

- ✓ **Value yourself and your options.** They are as important as anyone else's.
- ✓ **Know your needs and wants.** Learn to express them without infringing on the rights of others
- ✓ **Express negative thoughts** in a positive way. It's OK to be angry, but you must remain respectful as well.

- ✓ **Receive feedback positively.** Accept compliments graciously, learn from your mistakes, ask for help when needed.
- ✓ **Learn to say "no."** Know your limits and don't let others take advantage of you. Look for alternatives so everyone feels good about the outcome.

- **Developing assertive communication techniques**

- ✓ **Empathetic assertion** conveys sensitivity to the other person. First, recognize the other person's situation or feelings, then state your needs or opinion. "I know you've been very busy at work, but I want you to make time for us as well."
- ✓ **Escalating assertion** can be employed when your first attempts are not successful. You become increasingly firm as time progresses, which may include outlining consequences if your needs are not met. For example, "If you don't abide by the contract, I'll be forced to pursue legal action."
- ✓ **Practice assertiveness** in lower risk situations to help build up your confidence. Or ask friends or family if you can practice assertiveness techniques on them first.

- **Generally Effective communication techniques May include:**

1. verbal or non-verbal language
2. two-way interaction
3. constructive feedback
4. active listening
5. questioning to clarify and confirm understanding
6. interpreting non-verbal and verbal messages
7. observation techniques
8. use of positive, confident and co-operative language
9. control of tone of voice and body language
10. use of language and concepts appropriate to cultural differences
11. use of clear presentations of options and consequences
12. demonstrating flexibility and willingness to negotiate

- **Distinction between plans and policies**

You have already learnt the concept of plans and policies. The term plan is a more comprehensive concept covering not only policy but also several other predetermined courses of action. In this sense plans and policies are different concepts but they are not distinctly different. Well-formulated policies are a key to the success of any plan. The implementation of any plan requires policy guidelines. Organizations plans are based on established policies. Thus, planning and policy-making go together as important functions of management.

- **Importance of policies**

Organizational policies serve a range of important purposes, listed below:

1. They are the most important standing plans to guide.
2. They clarify and crystallize the real values and intentions of top management.
3. They facilitate delegation of authority among the various managerial levels
4. They contribute to the organization evolutions an orderly system of goal-oriented activity.
5. They facilitate uniformity of action and coordination of effort.
6. Policies minimize the destruction of decision-making process.

- ## Procedures

The term 'Procedure' is defined as a set of steps determined in advance and standardized for initiating, carrying through and completing a time-bound activity. Examples of such activities include purchase of raw materials for the manufacturing department, passing vendors' bills for payment, settlement of workers grievances, hiring manpower for the office, sanctioning earned leave, and so on.

A procedure specifies the tasks to be done sequentially for completing a piece of work. It lays down the process of doing routine and repetitive activity, for the guidance of those who are to carry out such activity. In other words, a procedure may be regarded as a guide to

The characteristics of a good procedure include the following**:**

1. It should be purposeful and functional.
2. It should be in a written form.
3. It should be simple and clear.
4. It should really serve as a guide to those who have to follow it.
5. It should not be overly rigid.
6. It should be exposed to periodic review and reform.

- **Uses and importance of procedures**

In organizations, procedures serve several useful purposes. Let us briefly discuss them.

1. Procedures provide guidance and instruction to administrative and other personnel on how to carry out specific activities in a systematic manner. They said simplifying, routinizing and standardizing the day-to-day paper work in organizations.
2. Procedures facilitate smooth, effective and orderly flow of activity in organizations and thus promote 'management by system: Procedures also permit consistency of action in various departments or sections at a point of time and over a period of time.
3. They serve as tools of supervision, control and coordination in the1 hands of managers with regard to the task performance of their subordinates.
4. Since procedures are laid down by managers after careful thinking they represent.

- **Schedules**

The term 'Schedule' is defined as a plan of action which focuses on the 'when' aspects of initiating and completing operations regarding specific jobs. In manufacturing operations, machines and manpower are to be optionally utilized for production of concerned products and components have to be systematically planned in advance. For this purpose, time schedules are prepared for the starting and completion of the whole operation. While preparing such a schedule, managers at the operational level take into consideration several factors like delivery schedules of the completed products/ components, the plant capacity, the machine workloads, already committed but are pending to be executed, availability of labor, position regarding availability of materials and other inputs and so on.

- **Differences between procedures and schedules:**
    1. Procedures lay down the sequence of operations to be done for completing a particular piece of work or job. Schedules lay down the starting time for each operation and the length of time required for completing that operation.
    2. Procedures are generally administrative aids and **tools** while schedules are largely concerned with technical operation.
    3. Very high degree of coordination, synchronization and balancing is needed in working out schedules for different operations and for different procedures
- **Planning** and Organizing especially when production facilities are common for them.
  In the case of procedures, no such problems are generally experienced.

| Self-Check -4 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. That means, effective communication in a group is just about what you say and do, it includes being aware of what other group members contribute to the conversation. A. True B. True
2. Effective communication is about more than just exchanging information. A. True B. True
3. To avoid conflict and misunderstandings, you can learn how to quickly calm down before continuing a conversation. A. True B. False
4. To communicate effectively, you need not to avoid distractions and stay focused. A. True B. False
5. When communicating with others, we often focus on what we should say. A. True B. False
6. One of the following is an Effective communication skill.
   A. Become an engaged listener
   B. Pay attention to nonverbal signals
   C. Keep stress in check
   D. Assert yourself
   E. All
7. Effective communication is always about understanding the other person, not about winning an argument or forcing your opinions on others. Which is **not** included?
   A. Value yourself and your options
   B. Receive feedback positively
   C. Practice assertiveness
   D. Not Express negative thoughts
8. Organizational policies serve a range of important purposes:
   A. They are the most important standing plans to guide.
   B. They facilitate uniformity of action and coordination of effort.
   C. Policies minimize the destruction of decision-making process
   D. All

9. A procedure specifies the tasks to be done sequentially for completing a piece of work. In this cause, one is **not included in** a good procedure characteristic**:**
   A. It should be purposeful and functional.
   B. It should not be in a written form.
   C. It should be simple and clear.
   D. It should not be overly rigid.
10. What is the Difference between procedures and schedules?
   A. Procedures lay down the sequence of operations to be done for completing a particular piece of work or job. But Schedules lay down the starting time for each operation and the length of time required for completing that operation.
   B. Procedures are generally administrative aids and tools while schedules are largely concerned with technical operation.
   C. Very high degree of coordination, synchronization and balancing is needed in working out schedules for different operations and for different procedures.
   D. All

***Note:*** **Satisfactory rating ≥5 points Unsatisfactory <5points**

Answer Sheet-4

Name: ______________________ Date: ________________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

| |
|---|
| Score = ___________ |
| Rating: ____________ |

**4.2.**

### 5.1. Plan and participate in team activities to meet customer satisfaction

Complaints are an important way for the management of an organization to be accountable to the public, as well as providing valuable prompts to review organizational performance and the conduct of people that work within and for it.

A complaint is an "expression of dissatisfaction made to or about an organization, related to its products, services, staff or the handling of a complaint, where a response or resolution is explicitly or implicitly expected or legally required"1. As a matter of guidance, complaints can be made directly to an organization by members of the public and/or customers, or through alternative pathways such as to Members of Parliament or statutory officers but otherwise about the organization.

An effective complaint handling system provides three key benefits to an organization**:**

- It resolves issues raised by a person who is dissatisfied in a timely and cost-effective way;
- It provides information that can lead to improvements in service delivery; and
- Where complaints are handled properly, a good system can improve the reputation of an organization and strengthen public confidence in an organization's administrative processes.

These surveys are used to collect both qualitative and quantitative data for the organization in regard to its customer service performance. Unlike feedback forms, which are used continually, a survey is commissioned to question a defined population of respondents (in this case the organization's customers or potential customers) and obtain their thoughts, opinions and attitudes on a range of issues related to the organization and customer service in general.

Surveys can be performed once only or intermittently over a certain period of time; for example, every six months. Survey questions are structured and standardized so every respondent answers the same questions in the same way. This reduces bias and the time required to collate results. Surveys are an effective way to solicit customer feedback from a large number of actual or potential customers at once.

Other methods for receiving customer feedback include:

- customer feedback forms
- customer interviews
- focus groups
- toll-free feedback numbers
- suggestion boxes
- mystery shoppers
- secondary research
- third-party feedback.

Workplace **participation means** that **team** members can: influence the outcomes of issues that directly affect their **work**. accept delegation of responsibility. be involved in cooperative approaches to conflict. have shared understanding of objectives.

**20 Teamwork Strategies**

- Lead by example.
- Build up trust and respect.
- Encourage socializing.
- Cultivate open communication.
- Clearly outline roles and responsibilities.
- Organize team processes.
- Set defined goals.
- Recognize good work.

The five functions are trust, conflict management, commitment, accountability and focusing on results. To have a functioning team, one thing is a must and that is Trust. Trust is the foundation of a good team. Typically, teamwork is defined as: Co-operation between those who are working on a task. Teamwork is generally understood as the willingness of a group of people to work together to achieve a common aim. For example, we often use the phrase:" he or she is a good team player".

**Top 10 Teamwork Skills—Examples**

- Communication.
- Conflict resolution.
- Rapport-building and listening.
- Decision-making.
- Problem-solving.
- Organizational and planning skills.
- Persuasion and influencing skills.
- Reliability.

A **teamwork** environment promotes an atmosphere that fosters friendship and loyalty. These close-knit relationships motivate employees in parallel and align them to work harder, cooperate and be supportive of one another. Individuals possess diverse talents, weaknesses, communication skills, strengths, and habits.

**6 Benefits of Teamwork in the Workplace**

- Fosters Creativity and Learning. Creativity thrives when people work together on a team.
- Blends Complementary Strengths. Working together lets employees build on the talents of their teammates.
- Builds Trust.
- Teaches Conflict Resolution Skills.
- Promotes a Wider Sense of Ownership.
- Encourages Healthy Risk-Taking.

**qualities of successful team possess.**

- They're organized.

- They focus on goals and results.
- They have fun.
- Good leadership.
- Team members are diverse.
- Everyone contributes their fair share.
- They offer each other support.

Teamwork is an essential part of workplace success. Like a basketball team working together to set up the perfect shot, every team member has a specific role to play in accomplishing tasks on the job. Although it may seem as if one player scored the basket, that basket was made possible by many people's planning, coordination, and cooperation to get that player the ball. Employers look for people who not only know how to work well with others, but who understand that not every player on the team can or will be the one who gets the ball. When everyone in the workplace works together to accomplish goals, everyone achieves more. The ability to work as part of a team is one of the most important skills in today's job market. Employers are looking for workers who can contribute their own ideas, but also want people who can work with others to create and develop projects and plans. Teamwork involves building relationships and working with other people using a number of important skills and habits:

- Working cooperatively
- Contributing to groups with ideas, suggestions, and effort
- Communication (both giving and receiving)
- Sense of responsibility
- Healthy respect for different opinions, customs, and individual preferences
- Ability to participate in group decision-making When employees work together to accomplish a goal, everyone benefits.

Employers might expect to "see" this in action in different ways. For example, team members in the workplace plan ahead and work cooperatively to assign tasks, assess progress, and deliver on time. They have professional discussions during which differing approaches and opinions might be shared and assessed in a respectful manner. Even when certain employees end up with tasks that were not their first choices, jobs get done with limited complaints because it is in the spirit of teamwork and with the overall goal in mind. A leader or manager may often serve as the teamwork facilitator. In this case, team members participate respectfully in discussion, carry out assigned tasks, and defer to the leader in the best interest of the goal. Consensus is wonderful, but not always possible, and an assigned leader will often support and facilitate the decision-making necessary for quality teamwork to exist. The activities in this section seek to teach participants about the importance of teamwork to workplace success and the specific role each individual on a team may play. Participants will learn about positive teamwork behavior and discover how their own conduct can impact others on a team. The section also discusses possible obstacles to teams working successfully and offers the opportunity to build constructive strategies for overcoming these challenges.

| Self-Check -5 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. Workplace participation means that team members can: influence the outcomes of issues that directly affect their work. A. True B. True
2. The five functions of team are trust, conflict management, commitment, accountability and focusing on results. A. True B. True
3. Teamwork is generally understood as the willingness of a group of people to work together to achieve a common aim. A. True B. False
4. A teamwork environment promotes an atmosphere that fosters friendship and loyalty. A. True B. False
5. Team members in the workplace plan ahead and work cooperatively to assign tasks, assess progress, and deliver on time. A. True B. False
6. They have professional discussions during which differing approaches and opinions might be shared and assessed in a respectful manner. A. True B. False.

***Note:* Satisfactory rating ≥3 points** **Unsatisfactory <3 points**

Answer Sheet-5

Name: _____________________ Date: _______________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

Score = ___________

Rating: ____________

| Information sheet-6 | Use available resources |
|---|---|

**6.1. Use available resources to meet customer requirements and services.**

Customers have needs and requirements. A customer need establishes the relationship between the organization and the customer (example: I need (or want) an iPad).

Requirements are those characteristics that determine whether or not the customer is happy. here are four main customer needs that an entrepreneur or small business must consider. These are price, quality, choice and convenience.

The wants or voice of customer in stated or implied terms. Most of the times the customer is enabled to state the requirements precisely. (Like please bring me a glass of Luke warm water to drink). However, the customer may not always be able to precisely state or equipped to realize the basic attributes of his requirements. It is therefore the responsibility of the supplier to reconsider the attributes of desired/] supplied product in terms of the implied or real requirements. For example, the hygiene of the environment in which food is cooked in a restaurant.

- **Customer Service Representative Job Description**

The Customer Service Representative attracts potential customers by answering product and service questions; suggesting information about other products and services. Process orders, prepare correspondences and fulfill customer needs to ensure customer satisfaction.

Requires a high school diploma or equivalent and 0-3 years of experience in the field or in a related area. Has knowledge of commonly-used concepts, practices and procedures within a particular field. Rely on instructions and pre-established guidelines to perform the functions of the job. Works under immediate supervision. Primary job functions do not typically require exercising independent judgment. Typically reports to a supervisor or manager. The target is to ensure excellent service standards and maintain high customer satisfaction.

- **Customer Service Requirements:**
- ✓ Proven customer support experience
- ✓ Track record of over-achieving quota
- ✓ Strong phone contact handling skills and active listening
- ✓ Excellent communication and presentation skills
- ✓ Ability to multi-task, prioritize and manage time effectively
- ✓ High school diploma or equivalent; college degree preferred
- ✓ Proven customer support experience or Service Representative
- ✓ Track record of over-achieving quota
- ✓ Strong phone contact handling skills and active listening
- ✓ Familiarity with CRM systems and practices
- **Customer service representative top skills & proficiencies:**
  - ✓ Customer Service
  - ✓ Product Knowledge
  - ✓ Quality Focus
  - ✓ Market Knowledge
  - ✓ Documentation Skills
  - ✓ Listening Skills
  - ✓ Phone Skills
  - ✓ Resolving Conflict
  - ✓ Multitask
  - ✓ Patience
  - ✓ Negotiation
  - ✓ Positive Attitude
  - ✓ Attention to Detail
  - ✓ People Oriented
  - ✓ Analysis
  - ✓ Problem Solving
  - ✓ Organizational Skills
  - ✓ Adaptability
  - ✓ Ability to Work Under Pressure
  - ✓ Computer Skills

| Self-Check -6 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth two points.

1. Requirements are those characteristics that determine whether or not the customer is happy. A. True B. True
2. The voice of customer in stated or implied terms. Most of the times the customer is enabled to state the requirements precisely. A. True B. True
3. The customer may not always be able to precisely state or equipped to realize the basic attributes of his requirements. A. True B. True
4. the responsibility of the supplier to reconsider the attributes of desired/] supplied product in terms of the implied or real requirements. A. True B. True
5. The Customer Service Representative attracts potential customers by answering product and service questions; suggesting information and services. A. True B. True
6. Primary job functions do not typically require exercising independent judgment. A. True B. True

***Note:* Satisfactory rating ≥6 points** **Unsatisfactory <6 points**

Answer Sheet-6

Name: ____________________ Date: _______________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______

Score = ___________

Rating: ____________

| Instruction Sheet-1 | LG 81: Respond to Customer Needs and Concerns |
|---|---|

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Clarifying customer needs and expectations.
- Resolving customer concerns or complaints according to organizational policies and procedures.
- Addressing customer needs or complaints clearly, politely and effectively.
- Refer customer concerns related to organizational liability to appropriate persons or departments according to organizational policy.
- Completing documentation and process it according to organizational and statutory requirements.

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Clarify customer needs and expectations.
- Resolve customer concerns or complaints according to organizational policies and procedures.
- Address customer needs or complaints clearly, politely and effectively.
- Refer customer concerns related to organizational liability to appropriate persons or departments according to organizational policy.
- Complete documentation and process it according to organizational and statutory requirements.

**Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below
3. Read the information written in the "Information Sheets "1- 5". Try to understand what are being discussed.
4. Accomplish the "Self-checks 1,2,3,4, and 5" in each information sheets on pages 51,54,58,62, and 75.
5. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-checks).
6. If you earned a satisfactory evaluation proceed to "self-checks 1, 2,3,4, and 5 on pages 51,54,58,62, and 75. However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity.
7. After You accomplish Operation sheets and LAP Tests, ensure you have a formative assessment and get a satisfactory result; then proceed to the next LG.

| Information Sheet-1 | Clarify customer needs and expectations |
|---|---|

## 3.1. Clarify customer needs and expectations

To identify needs, you must both listen and ask the right questions. After identifying needs, always check for additional or related needs. Use your knowledge and experience to identify and present the right products, services, and solutions to meet your customers' needs.

A want is simply something that we'd like to have for whatever rational or irrational reason. Expectations are the anticipated circumstances of a purchase. Needs, wants, and expectations are the key motivations that drive the customer, and for that matter, any person. To identify the needs of your customers, solicit feedback from your customers at every step of your process. You can identify customer needs in a number of ways, for example, by conducting focus groups, listening to your customers or social media, or doing keyword research.

The five needs of customers are: Action, Appreciation, Price, Service and Quality. Price: customers are always on the lookout for the best price that match their needs. Quality: customers need good and durable products.

What are the 4 main customer needs?

There are four main customer needs that an entrepreneur or small business must consider. These are **price, quality, choice** and **convenience**.

- **How do you set customer expectations?**

Here are five effective ways to manage expectations**:**

1. Cover more solutions. Employees on the front line who deal with customers most often need to be armed with a variety of solutions to common and potential issues. .
2. Be transparent.
3. Give clear timelines.
4. Be optimistic and realistic.
5. Follow up.

- **What are three ways to determine customer needs and wants?**
    - Starting with existing data.

- Interviewing stakeholders.
- Mapping the customer process.
- Mapping the customer journey.
- Conducting “follow me home” research.
- Interviewing customers.
- Conducting voice of customer surveys.
- Analyzing your competition.

| Self-Check -1 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth two points.

1. To identify needs, you must both listen and ask the right questions. A. True B. False
2. After identifying needs, always check for additional or related needs. A. True B. False
3. Expectations are the anticipated circumstances of a purchase. A. True B. False
4. Needs, wants, and expectations are the key motivations that drive the customer, and for that matter, any person. A. True B. False
5. To identify the needs of your customers, solicit feedback from your customers at every step of your process. A. True B. False
6. The five needs of customers are: Action, Appreciation, Price, Service and Quality. Price: customers are always on the lookout for the best price that match their needs. A. True B. False
7. There are four main customer needs that an entrepreneur or small business must consider. A. True B. False
8. There are four main customer needs that an entrepreneur or small business must consider. A. True B. False

***Note:*** **Satisfactory rating ≥8 points** **Unsatisfactory <8 points**

Answer Sheet-6

Name: ____________________ Date: _______________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______

**Score =** __________

**Rating:** ____________

## 2.1. Resolving Customer Complaints

Unhappy customers are bad news for any company, and it only takes one of them to shatter a perfectly good day at work for everyone. It only takes one of them to steer many more prospective customers away from you.

Unhappy customers have their reasons. Some don't feel well, some have unrealistic expectations, and others may just have lousy dispositions. However, we must be honest; others may have a legitimate gripe, for somehow, some way, we may have been the catalyst that tipped the scale to take them from annoyed to cranky to downright unhappy.

Whatever the cause, unhappy customers are still our guests and our hope for future business, and we want them happy again. Said another way, the customer may not always be right, but he or she will always be the customer we want and we need. So, we need to take control of customer complaints and turn them to our advantage.

Here are 7 steps for resolving customer complaints which have proven to work well.

**1. Listen Intently:** Listen to the customer, and do not interrupt them. They need to tell their story and feel that they have been heard.

**2. Thank Them:** Thank the customer for bringing the problem to your attention. You can't resolve something you aren't completely aware of, or may be making faulty assumptions about.

**3. Apologize:** Sincerely convey to the customer your apology for the way the situation has made them feel. This is not the time for preachy reasons, justifications or excuses; you must apologize.

**4. Seek the Best Solution:** Determine what the customer is seeking as a solution. Ask them; often they'll surprise you for asking for less than you initially thought you'd have to give especially when they perceive your apology and intention is genuinely sincere.

**5. Reach Agreement:** Seek to agree on the solution that will resolve the situation to their satisfaction. Your best intentions can miss the mark completely if you still fail to deliver what the customer wants.

**6. Take Quick Action:** Act on the solution with a sense of urgency. Customers will often respond more positively to your focus on helping them immediately versus than on the solution itself.

**7. Follow-up:** Follow-up to ensure the customer is completely satisfied, especially when you have had to enlist the help of others for the solution delivery. Everything up to this point will be for naught if the customer feels that “out of sight is out of mind.”

Problems happen. It’s how you honestly acknowledge and handle them which counts with people. Customers will remember you, and happily give you another chance to delight them when you choose to correct problems with the very best you can offer, proving you value them and their business.

Explain Organizational procedures for dealing with customer complaints

- **Complaints handling procedure**
  - ✓ Listen to the complaint.
  - ✓ Record details of the complaint.
  - ✓ Get all the facts.
  - ✓ Discuss options for fixing the problem.
  - ✓ Act quickly.
  - ✓ Keep your promises.
  - ✓ Follow up.

| **Self-Check -2** | **Written Test** |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

7. Listen to the customer, and do not interrupt them is the best activity. A. True B. False
8. resolve something that you aren't completely aware of, or may be making faulty assumptions. A. True B. False
9. Apologize to the customer is not the time for preachy reasons, justifications or excuses. A. True B. False
10. Seek the Best Solution determines, what the customer is seeking as a solution. A. True B. False
11. Seek to agree on the solution, will resolve the situation to their satisfaction. A. True B. False
12. Customers will often respond more positively to your focus on helping them immediately versus than on the solution itself. A. True B. False
13. Follow-up to ensure the customer is completely satisfied, especially when you have had to enlist the help of others for the solution delivery. A. True B. False
14. Customers will remember you, and happily give you another chance to delight them when you choose to correct problems. A. True B. False
15. Write all the Complaints handling procedures

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5points**

Answer Sheet-2

Name: ____________________Date: _______________

**Score =** ___________

**Rating:** ____________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________

10. ________ ________ ________ ________ ________ ________ ________ ________

## 3.1. Address customer needs or complaints clearly, politely and effectively

What are the unstated concerns of a customer who is looking for service from your company? What do they want? What do they need? Here are their expectations**:**

**1. I expect to deal with someone nice**

The most basic customer need of all is to interact with someone who's friendly. The tone should always be warm and cheery, but that's hard to maintain if employees are unhappy.

**2. I need you to understand where I'm coming from.**

Customers need to feel that I appreciate and sympathize with their feelings and problems. Putting myself in the customer's shoes without judgment leads to better relationships and faster problem resolution.

**3. I want to be treated fairly.**

Any customer will become offended or annoyed if they feel I'm regarding them with any sort of bias or stereotyping. 70% of the buying experience depends on how customers feel they are treated. Rather than making assumptions or talking down to anyone, I'm obligated to treat every customer with the same respect and courtesy.

**4. I need to know that I have some influence.**

Customers need to feel their needs matter and that their business is important enough to get them results. I need to present them with reasonable, personalized solutions, not company policies or scripted responses.

**5. I want to understand what my options are.**

A customer looking for certain services or problem resolution needs to know that they have options, and are not bound by company rules to any specific actions. If there's more than one way to handle the issue, it's best that I let the customer know, and let them make the choice.

**6. I'm going to need more information.**

Customers want to be informed of what they are entitled to with their purchase. They may be resentful or feel cheated if I leave anything out. As the company leader, I need to ensure prospects get their answers, and my staff does their homework.

**7. I don't like to be kept waiting.**

45% of US consumers disconnect if they aren't helped promptly. To be kept waiting is demeaning and frustrating, especially if the customer paid good money and ended up with problems. By leaving them on hold or waiting on a response we only increase their frustration, so I take every measure to ensure I don't have to leave them hanging.

**8. I don't want to be wasting my time.**

My customers should feel from start to finish that I value their business and their feedback, since I can learn from failures. For the best customer experience, they should also feel that I have been of value to them, so I try to stay focused on delivering positive outcomes.

**9. I'm expecting *your* help.**

I expect staff to take full responsibility for every interaction that they initiate or have an impact on, even if they're obliged for whatever reason to hand it off to someone else. 26% of consumers say they've dealt with multiple agents with no resolution to their problem. My customers expect me to follow through and see that their needs are satisfied.

**10. I expect you to have everything ready for me.**

In order to avoid any hint of incompetence or lack of commitment, I have to appear with all the materials I need before speaking to a client, and I never ask questions that I could have found out for myself.

**11. You should be on *my* side.**

Customers risk money, reputations, and even careers by doing business with my organization. Branded conversations are useful, but customers need to feel that I'm working in their best interests, not pursuing an agenda.

**12. I need simple explanations.**

Customers shouldn't be overwhelmed with information and shouldn't feel like they're lost. I need to remind myself to slow down and express myself in clear, simple language, not technical jargon- keeping it simple is important.

**13. I expect to get what I paid for.**

Not just selling, but consistently and accurately delivering, is an important part of sustaining business. Failure to meet my promises tells customers I'm not trustworthy.

**14. I need you to be one of the mavericks.**

Customers want real, human interaction, not robotic responses and bureaucracy. I want to give the impression that they and their predicaments are unique, and I'm willing and inspired to go above and beyond to do whatever it takes to resolve the problem.

**15. I need you to anticipate my needs.**

Yes, some customers expect me to be a mind reader, or they don't really know what the problem is or even the right questions to ask. Really listening to what they say, and drawing on my own experience, helps me to understand what they need even when they can't - or won't - express it.

**Conclusion**

Unscrupulous pricing, hackers, and customer abandonment are taking their toll on consumer confidence, especially on the Internet. 55% of consumers would pay more for a better buying experience. And alternatives are a click away.

How we interact with customers is essential to gaining repeat business. It's 6-7 times more costly to gain new customers. Not only meeting but exceeding customer expectations is what we should strive for. By understanding these fundamental customer concerns before you even start your marketing campaigns, positive experiences become much easier.

| Self-Check -3 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. The tone should always be warm and cheery, but that's hard to maintain if employees are unhappy. A. True B. False.
2. Putting myself in the customer's shoes without judgment leads to better relationships and faster problem resolution. A. True B. False.
3. Any customer will become offended or annoyed if they feel I'm regarding them with any sort of bias or stereotyping. A. True B. False.
4. Customers need to feel their needs matter and that their business is important enough to get them results. A. True B. False.
5. A customer looking for certain services or problem resolution needs to know that they have options, and are not bound by company rules to any specific actions. A. True B. False.
6. For the best customer experience, they should also feel that I have been of value to them, so I try to stay focused on delivering positive outcomes. A. True B. False.
7. In order to avoid any hint of incompetence or lack of commitment, we have to appear with all the materials we need before speaking to a client, A. True B. False.
8. Customers shouldn't be overcome with information and shouldn't feel like they're lost. A. True B. False.
9. Customers want real, human interaction, not robotic responses and bureaucracy. A. True B. False.
10. Really listening to what they say, and drawing on my own experience. A. True B. False.

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5 points**

Answer Sheet-3

Name: _____________________ Date: _______________

Score = ____________

Rating: _____________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

| Information Sheet-4 | Referring a complaint |
| --- | --- |

## 4.1. Referring a complaint

- **Referring a complaint to another entity**

After assessing a complaint, the Office of the Health Ombudsman may make the decision to refer the complaint to another agency. When referring a complaint, we will consult with the other agency and provide them with all relevant information.

We can refer complaints about a health practitioner to a relevant Queensland Government department, to the police or the Crime and Corruption Commission, to another state government or the Commonwealth Government. Complaints about registered health practitioners can be referred to the Australian Health Practitioner Regulation Agency (AHPRA), for it and/or the relevant national board to resolve.

Serious complaints, such as those involving professional misconduct or that form grounds for the suspension or cancellation of a practitioner's registration, will not be referred and will only be dealt with by the Office of the Health Ombudsman.

- **Referring a complaint to the Director of Proceedings**

The Director of Proceedings is a statutory position within the Office of the Health Ombudsman, responsible for independently assessing complaints and other matters from a legal standpoint and deciding whether to take them before the Queensland Civil and Administrative Tribunal (QCAT).

The Health Ombudsman can refer a complaint to the Director of Proceedings. Generally, this is for serious complaints that may require legal review or referral to the QCAT.

After reviewing a matter, the Director of Proceedings will decide to either refer the matter to QCAT or refer the matter back to the Health Ombudsman for further action.

- **Referring to QCAT**

If referring a matter to QCAT, the Director of Proceedings is guided by**:**

- ✓ the fundamental principle of the *Health Ombudsman Act 2013*—that the health and safety of the public are paramount
- ✓ the seriousness of the matter
- ✓ the likelihood of proving the matter before QCAT
- ✓ any orders that QCAT make.

The Director of Proceedings may consult with a relevant national board, if the complaint is about a registered practitioner.

Under the *Health Practitioner Regulation National Law Act 2009*, the Health Ombudsman must refer certain matters directly to QCAT. The Director of Proceedings must refer any such matters immediately.

- **Referring to the Health Ombudsman**

When referring a matter back to the Health Ombudsman, the Director of Proceedings may recommend a particular course of action, such as gathering further evidence or conducting further investigations.

Once a matter is referred back to the Health Ombudsman, the health service provider and complainant (if there is one) will be advised of the decision and anything more that is required of them.

Referring Customers **-** An Important Part of Customer Service. When customers are referred to other members within an organization, they can feel frustrated and perhaps even become hostile if they feel they are getting the "run around". Read on for some great tips on handling the referral process so that your customer keeps on coming back.

If you deal at all with the public, it is probably a rare day when you don't have to refer a customer elsewhere for service. It may be that the person is in the wrong place, or the person is required to see several people in sequence and you are the first. Sometimes, the customer's issue needs to be dealt with by someone with a different authority level, such as a supervisor or manager.

It is a reality of business that some referring is necessary. Unfortunately, a common complaint on the part of members of the public is that they tend to be shuffled from person to person within the same company. On occasion one hears of situations where a person is moved from one person to another until he or she ends up back at the first person that was contacted.

Members of the public may have come to expect this "shuffle of referral", but many times they prepare for it by behaving in a hostile manner towards you, even though, you may have never met. One common complaint that employees have is that when customers are referred to them, they are not given the information to appear informed and helpful to the customer. It can be embarrassing.

We are going to look at some ideas you can apply to help reduce customer frustration, and make the jobs of others a bit easier. Hopefully, others can do the same for you.

Keep in mind that when referring you are trying to**:**

- ✓ reduce the need for the customer to repeat his or her story from the beginning
- ✓ show the customer that you are making an effort to reduce his or her frustration
- ✓ reduce waiting
- ✓ appear knowledgeable by referring to the correct place the first time.

| Self-Check -4 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth two points.

1. After assessing a complaint, the Office of the Health Ombudsman may make the decision to refer the complaint to another agency. A. True B. True
2. Serious complaints, such as involving professional misconduct or that form grounds for the suspension or cancellation of a practitioner's registration, will be referred and will only be dealt with by the Office of the Health Ombudsman. A. True B. True
3. After reviewing a matter, the Director of Proceedings will decide to either refer the matter to QCAT or refer the matter back to the Health Ombudsman for further action. A. True B. False
4. The Director of Proceedings may consult with a relevant national board, if the complaint is about a registered practitioner. A. True B. False
5. Once a matter is referred back to the Health Ombudsman, the health service provider and complainant (if there is one) will be advised of the decision and anything more that is required of them. A. True B. False

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5points**

Answer Sheet-4

Name: ____________________ Date: _______________

Score = ___________

Rating: ____________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

| Information Sheet-5 | process of documentation |
|---|---|

### 5.1. process of documentation

A process document outlines the steps necessary to complete a task or process. It is an internal, ongoing documentation of the process while it is occurring documentation cares more about the "how" of implementation than the "what" of process impact. A business is essentially a group of interrelated processes, and if these processes aren't in writing, breakdowns can occur. Companies have repeatable processes fundamental to their successful operation, thus process documentation serves as a crucial guide for employees and managers to reference.

- **Why you need process documentation**

Process documentation is a roadmap for your organization. it helps you identify the current state of a process to know how you can improve it. Any task that is done more than once or completed by multiple people needs to be documented. Doing so provides consistency for your organization and allows you to monitor and revise processes as you go along.

Think about it this way. even highly skilled pilots who spend thousands of hours training and flying rely on preflight checklists. They don't just rely on memory, and no step is considered too minute.

Process documentation also allows you to know what people are doing and gain insight into the inner workings of the company. If you don't document a process, essentially it is being re-designed by someone every time it is repeated. When an employee leaves, any process knowledge leaves with them unless it has been properly recorded.

When you hire new employees, you need a documented process to help them understand their role and how it fits within the overall organization. Documented processes facilitate formal training that allows for smooth onboarding.

Process documentation becomes especially crucial when dealing with projects working towards social change, as it focuses on recording the perceptions and changes in perceptions of involved stakeholders.

Today's world consists of users who just want to get things done. They have so many things competing for their attention; they demand intuitive and task-based information, which is where process documentation becomes key.

- **What is the goal?**

Process documentation is about keeping track of a process during the execution of a project. The goal is to learn from the implementation so you can adjust the strategy and improve the procedure.

Proactively managing processes can**:**

- ✓ Eliminate flaws
- ✓ Reduce time spent on tasks
- ✓ Decrease costs
- ✓ Decrease resources associated with tasks
- ✓ Improve efficiency
- ✓ Improve overall quality
- ✓ Increase customer and employee satisfaction

Process documentation helps others to realize the changes in behavior and attitudes needed to produce desirable results, and it provides context for processes so that others can see how a project fits into the big picture and what its overall impact is.

- **Who is involved?**

- ✓ **Project Team:** The project team holds responsibility for process documentation. It should become a part of the team activity so that learning becomes integral. However, it can be helpful to have someone not involved in the daily project work own the documentation so that they can focus on recording processes, organizing information, encouraging reflection and distributing information. That person must stay close to project objectives in order to allow for learning and adaptation as the project progresses.
- ✓ **Stakeholders:** Any stakeholders involved in a specific project need to be involved in process documentation so that they can learn about others' opinions and perspectives to help them learn and reflect.
- ✓ **Outsiders:** Outsiders provide a new and unbiased perspective to help improve processes.

- **Benefits & uses**

While it may be time-consuming, process documentation provides numerous benefits to your organization that make it well worth the effort.

- ✓ Allows for continual and timely changes in processes to increase productivity
- ✓ Prevents procedures from going unused due to lack of understanding
- ✓ Preserves knowledge even when those involved in the process leave the company
- ✓ Helps determine if processes are efficient or if certain steps need to be eliminated/revised
- ✓ Assists all members of an organization in understanding processes and knowing who to contact with problems
- ✓ Improves security
- ✓ Makes it easier to maintain standards and consistency, follow external rules and regulations and support due diligence efforts
- ✓ Serves as on-hand teaching tools for new hires
- ✓ Offers context for individual projects
- ✓ Encourages debate about current processes
- ✓ Allows for outsourcing because you can easily transfer knowledge

- **Disadvantages**

- ✓ Stakeholders behave differently when they know what they say is being included in process documentation.
- ✓ The person recording a process may not fully understand it themselves.
- ✓ Special interest groups can use process documentation to start trouble.
- ✓ Process documentation can slow a project down.
- ✓ Diagramming is quick and easy with Lucidchart. Start a free trial today to start creating and collaborating.

- Tools for process documentation

- ✓ Tools for capturing the process, such as interviews, group discussions, videos, photographs, observations of users, field diaries, etc. It can be very helpful to interview those who are experts on the process to ensure you cover all information.

- ✓ Tools for organizing information. You can summarize knowledge in articles, case studies, video bites, etc.
- ✓ Tools for visualizing processes, such as Lucid chart's process documentation software.
- ✓ Tools for distributing information, such as email, newspapers, internet, etc.

- **Quality process documentation**

Not only do you need to document your processes, but you need to document them well. A poorly written procedure can result in failure. Common causes of poorly-written procedures include:

- ✓ Not explaining purpose or motivation for the task
- ✓ Leaving out information
- ✓ Including unnecessary and distracting information

Process documents reveal a great deal about your business philosophy. Poorly written and out-of-date documents can signal a lack of caring. Current and polished documents empower teams and improves efficiency.

- **How to make a process document**

1. Determine the scope of the document and identify your process. Will it cover one task in a chain of operations or the entire procedure for a manufacturing plant? It is best to have each document cover as small a process as possible.
2. Consider the audience for whom you are writing. What do they already know about the subject? Where and how are they using the product? What are their demographics?
3. Write a title and introduction describing what the process is, why or when users need to do it and how it fits into the big picture of the organization. Provide context as to why the process is important.
4. Describe the individuals who will be involved in the process and define their roles. Be sure to use job titles rather than individual names.
5. Identify the process boundaries, or start and end points.
6. Determine the outputs of the process, or what is being produced.
7. Determine the inputs of the process, or the resources needed to perform the process.

8. Brainstorm all the activities needed to complete the process. This pre-writing strategy is called “listing.”
9. Organize the items from your listing into sequential steps. Be careful how you split up steps. Actions that logically go together should be kept together. Generally, if a step includes more than one verb or the word “and,” it should likely be broken into two steps. Limit the number of steps—use subheadings for longer tasks and restart numbering under each subheading. Use layers—give users additional information in less prominent text underneath the main step.
10. Expand your steps to ensure all necessary information is included, such as potential hazards, troubleshooting advice or examples.
11. Construct a process flowchart to visually represent the steps.
12. Add any screenshots or graphics that provide clarity.
13. Format your information so that it is easy to scan, read and understand. Make use of bullets, tables, headings, etc. Clearly point out how processes connect to each other. For example, at the bottom of the Arranging the Newsletter document, direct readers to the Editing the Newsletter document.
14. Test the process. Watch someone else use it.
15. Ask colleagues to review your document and provide feedback.
16. Remember your documentation is a living document and will need to be continually updated.

- **Best practices**

✓ Make documents public and visible to reach all employees and readers.

✓ Store them in a central location—restricting access makes people think it is only relevant to a certain group.

✓ Make them easy to edit and search—processes undergo continual change, and new feedback should always be incorporated to improve effectiveness. Review documents at least once a year.

✓ Be concise—provide only what is necessary.

✓ Be flexible—be willing to adjust a process as needed to ensure steps come naturally.

- ✓ Get feedback from employees—frontline employees can provide insight on each step's importance, shortcuts, etc.
- ✓ Capture screen shots for anything difficult to explain.
- ✓ Use flowcharts—remember a picture is worth a thousand words Include a checklist to ensure every step is completed.
- ✓ Create a template to help standardize documents and facilitate the process.
- ✓ Keep formatting simple.
- ✓ Create a style guide for writers.
- ✓ Create individual documents for different processes and procedures rather than one massive document.
- ✓ Document when the process was most recently updated.
- ✓ Keep a local backup of the files on your desktop or in a private cloud-based system.

- **Improving the process**

As you monitor processes, look for specific areas that may need quality overview to improve efficiency, such as when a process moves from one person or team to another. Try to minimize unnecessary movement between departments during a process. Be on the lookout for duplicate tasks, and decide if having both is useful or inefficient.

Entrepreneurs need to avoid business myopia—being too close to your processes can keep you from advancing on the business process procedures journey. You need to work on your business rather than in it to to be able to identify key processes and improve them.

- **Software documentation**

Software documentation is a type of process documentation that helps with efficient and appropriate use of software. While originally designed to aid experienced users, it has evolved to include teaching new users. This evolution resulted in task orientation, which is explaining information sequentially. A good document should encourage the use of the program in the workplace by making it understandable to the user.

What is Process Documentation |The Easy Guide to Process Documentation

As your business grows, so does its complexity. There are more steps, more people, and more things involved that may not always be arranged in the most efficient way.

Rethinking how your business works may sound daunting, but it’s bound to get you major efficiencies. Process documentation is the first step towards this!

This easy guide to process documentation will help you do it just right.

Read on to find;

- ✓ What is Process Documentation?
- ✓ Why Do it: The Importance of Process Documentation
- ✓ How to Document a Process
- ✓ Tips and Tricks: Process Documentation Best Practices
- ✓ What’s in It for You: Benefits of Process Documentation
- ✓ Easy Starter Process Flowchart Templates

- **Processing the Documentation**

Process documentation provides a detailed description of how to carry out a business process. It includes all types of documents that support a process, like

- ✓ policies
- ✓ checklists
- ✓ tutorials
- ✓ forms
- ✓ screenshots
- ✓ links to other applications
- ✓ process maps

It is used as a guide to help employees at all levels, including decision makers and stakeholders, quickly understand company processes.

**Documenting a process will help you achieve 5 key things:**

1. **Helps improve processes.** Identify bottlenecks and inefficiencies by documenting the exact processes. You'll quickly see what processes that you need to improve or get rid of.
2. **Helps train employees.** You can use process documents to help new employees understand their job roles and familiarize themselves with the processes they'll be involved in. Even experienced employees can still refer to these documents whenever they want to make sure that they are executing the process right.
3. **Helps preserve company knowledge.** Keep a record of processes known only to a few people specialized in doing them. That way even when they leave, the newcomers can resume the work easily.
4. **Helps mitigate risks and maintain operational consistency**.
5. Detailed process documentation is also **a vital part of patents and trade secrets**.

**Who is Involved in Process Documentation?**

There are 3 key ownership roles in process documentation. In some cases, the same person may play all three roles.

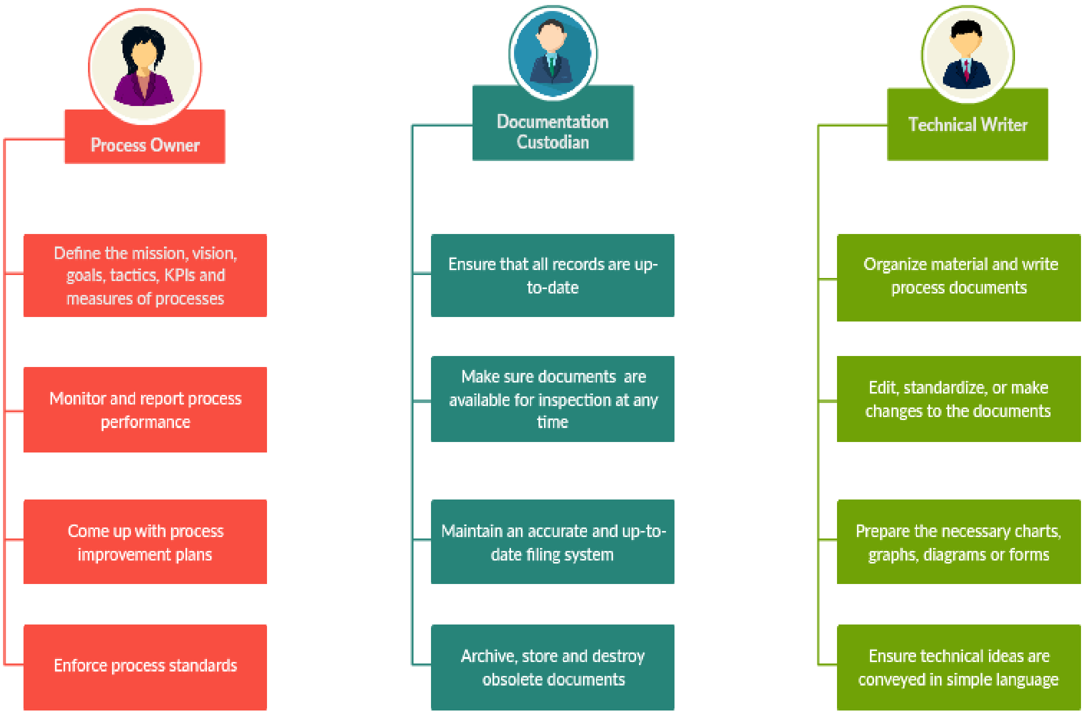


Figure 1: process of documentation

- **How to Document Processes**

Using a step-by-step method to document a process will help you get it done quickly.

**Step 1: Identify and Name the Process**

Figure out which process you are going to document first. Determine its purpose (why and how the process will benefit the organization) and provide a brief description of the process.

**Step 2: Define the Process Scope**

Provide a brief description of what is included in the process and what is out of the process scope, or what is not included in it.

**Step 3: Explain the Process Boundaries**

Where does the process begin and end? What causes it to start? And how do you know when it's done? Get these boundaries well defined.

**Step 4: Identify the Process Outputs**

Establish what will be produced by the process or what result the process will achieve once it is completed.

**Step 5: Identify the Process Inputs**

List down what resources are necessary to carry out each of the process steps.

**Step 6: Brainstorm the Process Steps**

Gather all information on process steps from start to finish. Either start with what triggers the process or start at the end of the process and track back the steps to the starting point. The brainstorming session should involve those who are directly responsible for the process tasks or someone with extensive knowledge of it, as they can provide precise data.

**Step 7: Organize the Steps Sequentially**

Take the list of steps you've come up with and put them in a sequential order to create a process flow. Keep the number of steps to a minimum and if a step includes more than one task, list them under the main step.

**Step 8: Describe who is Involved**

Decide **each individual who will be responsible for the process tasks**. Define their roles. Keep in mind to mention their job title rather than their name.

Also be considerate about **those who would be referencing the document**. Write it in a way that any employee with a reasonable knowledge can read and understand it.

### Step 9: Visualize the Process

This is to improve clarity and readability of your documentation. Using a process flowchart, neatly visualize the process steps you've identified earlier.

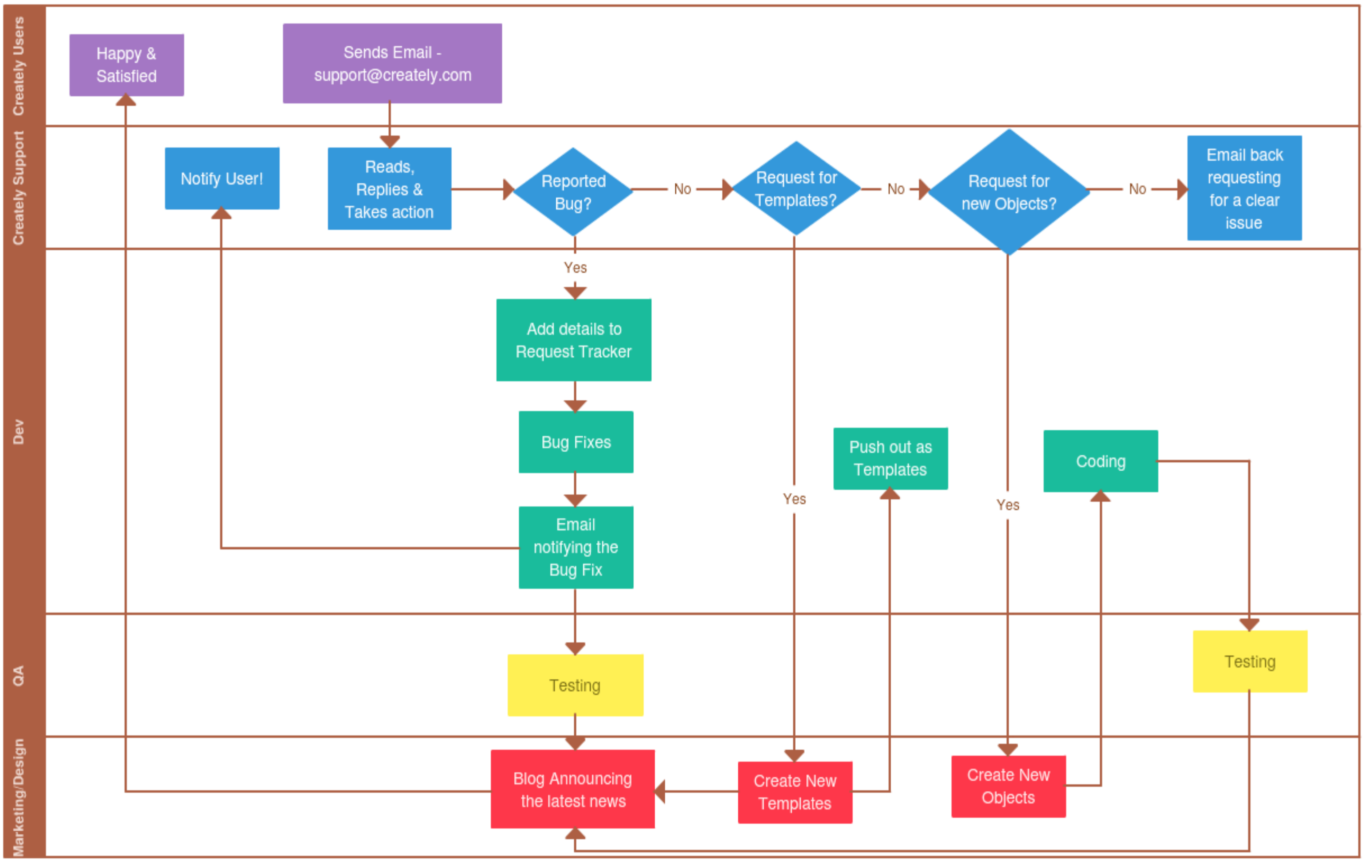


Figure 2: process of visualizing step by step

### Step 10: Note down Exceptions to the Normal Process Flow

A business process may not always follow the same flow due to various reasons. Mention these exceptions and what steps will be taken to address them.

### Step 11: Add Control Points and Measurements

Identify where risks could occur in the process and add control points to help the process owner when monitoring the process. Establish measurements to determine the effectiveness of the process and to help improve it.

**Step 12: Review and Test the Process**

Gather everyone involved and review the process flowchart you've mapped. Are there any missing steps? Is everything in order? Once done, test the process and see if you've missed anything.

- **Process of Documentation Best Practices**

✓ Keep the document simple and concise. While it should be technically accurate, it should be easy to follow.

✓ Have a proper plan in place to update the documents when/if the process would change. Make sure to review them at least once a year.

✓ Or assign a process owner who can do regular reviews and notify others of the changes.

✓ Keep separate documentation for every different process to avoid confusion.

✓ When documenting processes for the first time, avoid covering the entire organization at once.

✓ Store the documents in a location that is easy to be accessed by anyone who is looking for it.

✓ Make sure that it is easy to be revised when needed and the new version can easily be distributed to everyone involved.

✓ Have documents stored online in a central location via a process documentation tool. This will automatically help with the above mentioned two best practices.

✓ Use appropriate examples, graphics, color coding, screenshots, multiple platforms etc. as necessary.

✓ Make sure the process documentation complies with the existing standards of your organization.

✓ If you are highlighting the process flow in a verbal format, always balance it with graphics a process flowchart.

✓ Create a process documentation guide, which anyone can refer to as a standard template for documenting a process.

✓ Make use of existing documentary material, records, interviews, case studies, field-diaries of project staff and the knowledge of employees to gather information for process documentation.

**complaints handling forms:**

## CLIENT COMPLAINT FORM

**A. Client Information :**

| | |
|---|---|
| Name: | Account Number: |
| Address: | Telephone Number: |

**B. Brief Summary of the Complaint:**
Please describe the product or service you are complaining about (*description, evidence, amount and suggested way to be solved*):

*Please enclose any other relevant documentation that may help us to handle the complaint.*

Date and place

Client Signature

| ***For internal use only:*** | |
|---|---|
| Complaint Received By: | Date: |
| Acknowledgement sent to Client within 48hrs: | □ Yes - □ No |
| Informed Client of initial action: | □ Yes - □ No |
| Final response provided to Client within 4 weeks: | □ Yes - □ No |
| Holding response provided to Client: | □ Yes - □ No - □ N/A |
| List of further actions taken as per holding response: | |
| Signature of compliance officer: | Date: |

| Self-Check -5 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. One of the following is the process of managing documents.
   A. Reduce time spent on tasks
   B. Increase resources associated with tasks
   C. Improve efficiency
   D. Improve overall quality
2. Who is involved in processing documents?
   A. Project Team
   B. Stakeholders
   C. Outsiders
   D. All
3. One of the following is **not** Common causes of poorly-written procedures in Quality process documentation:
   A. Explaining purpose or motivation for the task
   B. Leaving out information
   C. Including unnecessary and distracting information
   D. Not explaining purpose or motivation for the task
4. Documenting process will help you achieve 5 key things:
   A. Helps improve processes.
   B. Helps clever employees.
   C. Helps preserve company knowledge.
   D. Helps mitigate risks and maintain operational consistency.
5. Best Practices in Process of Documentation are:
   A. Keep the document simple and concise.
   B. Have a proper plan in place to update the documents.
   C. Assign a process owner who can do regular reviews and notify others.
   D. Make sure that it is easy to be revised when needed

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5 points**

Answer Sheet-5

Name: ____________________ Date: _______________

| |
|---|
| Score = ___________ |
| Rating: ____________ |

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

| Instruction Sheet-3 | LG 82: Contribute to customer service standards |
|---|---|

This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics:

- Identifying and explain opportunities to improve services or processes to team members.
- Reviewing personal work performance to improve services to customers.
- Recording evidence of customer satisfaction and report to team members.
- Contributing to the development, and improvement of quality service policies and standards.

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, **upon completion of this Learning Guide, you will be able to**:

- Identify and explain opportunities to improve services or processes to team members.
- Review personal work performance to improve services to customers.
- Record evidence of customer satisfaction and report to team members.
- Contribute to the development, and improvement of quality service policies and standards.

**Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below
3. Read the information written in the "Information Sheets "1- 4". Try to understand what are being discussed.
4. Accomplish the "Self-checks 1,2,3, and 4" in each information sheets on pages 89,94,99, and 104.
5. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-checks).
6. If you earned a satisfactory evaluation proceed to "self-checks 1, 2,3, and 4 on pages 89,94,99, and 104. However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity.
7. After You accomplish Operation sheets and LAP Tests, ensure you have a formative assessment and get a satisfactory result; then proceed to the next LG.

| Information Sheet-1 | Identifying and explaining opportunity |
|---|---|

## 1.1. Introduction to Identify and explain opportunity

Opportunity definition, an appropriate or favorable time or occasion: Their meeting afforded an opportunity to exchange views. An opportunity is a situation in which it is possible for you to do something that you want to do. I had an opportunity to go to New York and study. The best reason for a trip to London is the super opportunity for shopping. I want to see more opportunities for young people.

- **Steps to Identify Opportunity**

**Step 1: Identify Opportunities**

The first step of our quality improvement journey begins when someone recognizes that an opportunity for improvement exists. This can be an outcome or process that is causing concern or identifying the potential for a proactive positive change. However, with competing priorities and limited resources, college health professionals need to prioritize where and how to allocate resources to obtain maximum benefit.

Step 1 will guide you through identifying, prioritizing, and ultimately selecting a specific opportunity to focus on. By the end of Step 1, you should be able to answer the following questions:

- ✓ What is the problem or opportunity for improvement?
- ✓ How do you know that it is a problem?
- ✓ What data/analysis supports this?
- ✓ Why is this issue important?

There are several frameworks and tools to help us assess and prioritize opportunities for improvement.

**Step 2: Establish a Team**

Improvement efforts require problem solving and figuring out effective solutions that involve complex systems. The knowledge, skills, experiences, and perspectives of a multidisciplinary improvement team are especially critical because**:**

- ✓ Systems and processes can be complex
- ✓ Creativity is necessary
- ✓ The path to improvement is often unclear

- ✓ Effective improvements should involve the most efficient use of resources possible
- ✓ Cooperation is essential to implementation
- ✓ Team members have a stake in the outcome
- ✓ Processes involved are often cross-functional
- ✓ No one individual has sufficient knowledge to solve the problem

At times our temptation, out of respect to the busy schedules of our colleagues, may be to work alone (or perhaps with only one other staff member) on an improvement project.

**Step 3: Set an Aim**

The most critical part of the improvement journey is establishing the aim. The purpose of an aim statement is to provide improvement teams with clear, well defined goals. It provides a sense of direction and will allow your team to identify the steps that should be taken to meet the end goal. Teams make better progress when their aim is very specific, unambiguous and focused.

An aim statement answers the first question in the Model for Improvement:

A strong aim statement operationalizes the problem identified in Step 1: it is time specific, measurable, and defines a specific population. As Don Berwick says "Some is not a number; soon is not a time." In other words, your aim statement should address these points:

- ✓ How good?
- ✓ By when?
- ✓ For whom (or what system)?

**Step 4: Understand the Problem**

Step 4 is about analyzing the current systems and processes and trying to gain insight into why these systems and processes produce the results that we aim to improve.

A process is "a set of causes and conditions that repeatedly come together in a series of steps to transfer inputs into outcomes. "A system is "an interdependent group of items, people, or processes with a common purpose."

Examples:

- ✓ Administering the to assess depression is one process of a system that provides care for an individual with depression.
- ✓ Patrolling smoking hotspots on campus is one process in a larger system of enforcement of a Tobacco Free Campus policy.

It is important to understand the current state before you begin testing or implementing changes. Edward Deming recognized something you may have also noticed: Life is messy and nonlinear. Deming described his System of Profound Knowledge as a "lens," and it is often depicted as a magnifying glass with four overlapping quadrants, each representing an essential component of systems thinking:

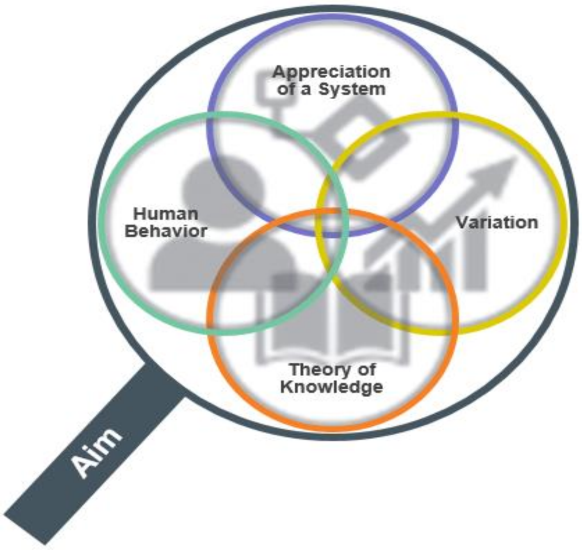


Figure 3 component of systems thinking

1. **Understanding variation.** What is the variation in results trying to tell you about the system? Why did something go wrong? Why are results so poor? How can you repeat successful results?
2. **Theory of knowledge.** What are your predictions about the system's performance? What are the theories that form the basis for these predictions?
3. **Psychology (human behavior).** What are the important interactions among people in the system? How do people in a system react to change? What motivates people to act as they do? Before you make a change in any system, the lens draws your attention to

four areas all of which you need to consider as a leader of improvement, but don't consciously notice when you're immersed within a complex system.

For this step you document the system and processes as they currently exist. Undertaking this exercise is important because it allows you to:

- ✓ Visualize the activities that make up a particular process
- ✓ Understand interrelationships
- ✓ Define the scope of an improvement effort
- ✓ Help to direct you to which data to collect and which measures to follow
- ✓ Identify obvious changes that can be made

**You may want to consider exploring any combination of the following questions:**

- ✓ What are we doing now?
- ✓ How do we do it? What are the major steps in the process?
- ✓ Who is involved or affected?
- ✓ Where does the problem occur?
- ✓ When does the problem occur?
- ✓ What happens when the problem occurs?
- ✓ Why does the problem occur?

This step often requires the use of existing data or may require new data collection.

**Tools**: There are multiple tools an improvement team can use to help understand and better define a process. They include:

- **Process Mapping**: a useful tool to help develop a picture of a process and communicate it among team members. Once a process map is developed it can be used to identify problematic areas and opportunities for improvement.
- **Value Stream Mapping**: is a more specific type of process mapping, often used with "Lean" improvement initiatives where value-added and non-value-added steps in the process are identified.
- **Pareto Charts**: is a simple bar chart showing how often a particular incident or event occurs. Additionally, Pareto charts include a line displaying cumulative frequency that allows for application of the "80/20 principle".

- **Cause and Effect (Fishbone) diagram**: allows for a more intentional approach to identify and ultimately correct the root causes of problems within a process.

## Step 5: Establish Measures

Measurement is at the core of improvement and has an essential role in effectively developing, testing, and implementing changes. Measurement helps us answer the second question in the Model for Improvement.

- **"How will we know a change is an improvement?"**

Without feedback, we have no way of knowing whether the changes we are making are leading to improvement. Data usually provide the most useful and objective form of feedback.

- **By the end of Step 5, you should be able to:**
  - ✓ establish the "family of measures" for your project, including process, outcome, and balancing measures
  - ✓ operationalize each measure
  - ✓ develop a measurement plan
- **Importance of Measurement for Improvement**

Measurement in quality improvement allows us to understand whether we have reached our improvement aims. To do so, we must define and operationalize what 'better' looks like and measure to know if the changes we make result in the improvements we seek. Measurement for improvement allows us to answer questions such as**:**

- ✓ What is the current state?
- ✓ What does "better" look like?
- ✓ How will we recognize better when we see it?
- ✓ What are factors, such as processes and activities, have an impact the outcomes?
- ✓ Are the processes stable and reliable?
- ✓ How do we know if a change is an improvement?

The graphic below depicts some of the different ways that measurement and data support each step throughout our improvement journey**:**

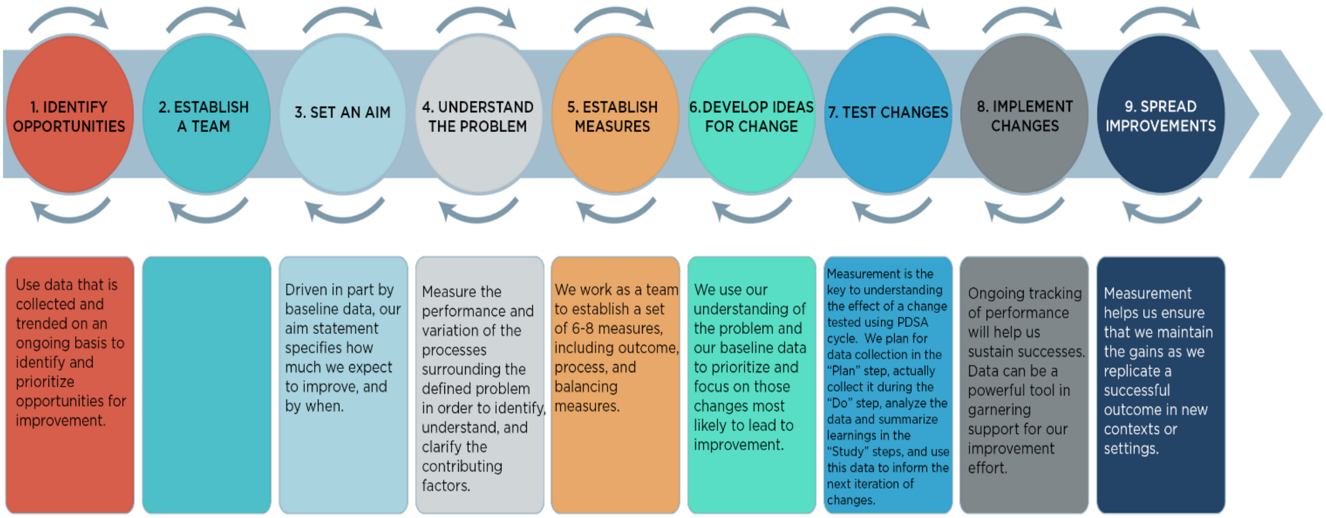


Figure 4: ways of different measurement and steps for improvement

Quality improvement requires a comprehensive understanding of the system or how the various processes work together to achieve outcomes. Establishing a "family of measures," provides a view of the system from the outcomes, to the processes, to the unintended impacts.

The approach below, coined by Robert Lloyd as the Measurement Journey Model, helps us establish valid and actionable measurement to support our improvement projects.

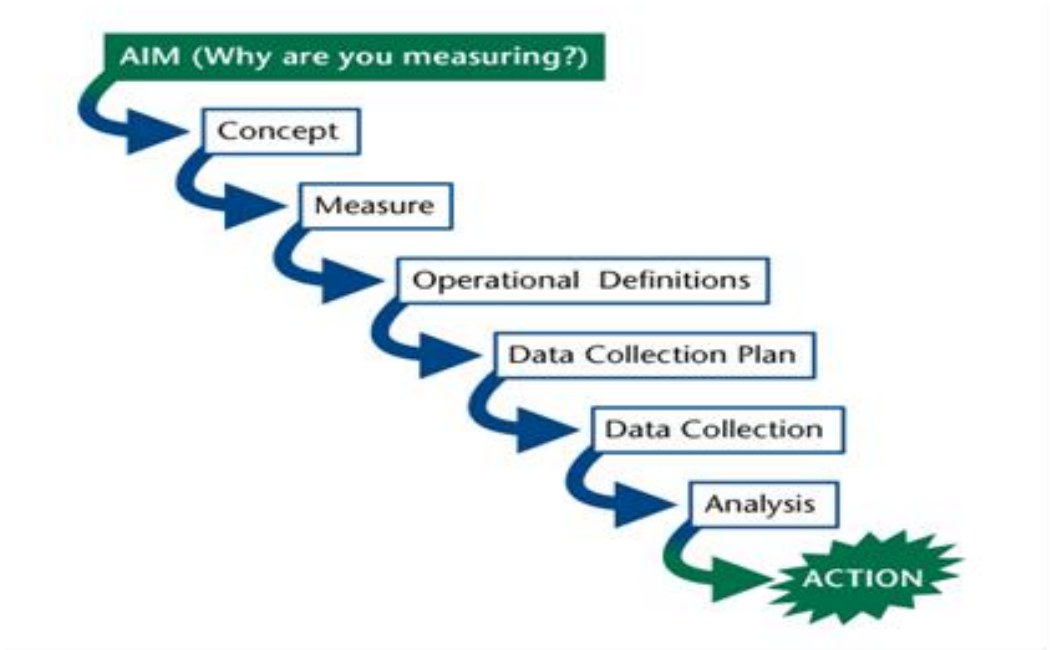


Figure 5: actionable measurement to support our improvement projects

- **What types of measures are there?**

When we create our family of measures for an improvement project, we always want to try to include a balanced set of measures that assess processes and outcomes as well as identifying balancing measures.

1. ***Outcome Measures:*** How does the system impact the values of students, their health and wellbeing? What are impacts on other stakeholders such as payers, employees, or the community?
2. ***Process Measures:*** Are the parts/steps in the system performing as planned? Are we on track in our efforts to improve the system?
3. ***Balancing Measures:*** Are changes designed to improve one part of the system causing new problems in other parts of the system?

**Step 6: Develop Ideas for Change**

Where do changes that result in improvement come from? Sometimes people are just lucky. Unfortunately, we cannot count on luck, and people have a tendency to resort to some common, though often ineffective, ways of developing change.

Step 6 will guide you through the process of pursuing opportunities for change purposefully so that you can answer effectively the third question in the Model for Improvement:

- **"What changes can we make that will result in improvement?"**

Understanding the degree of improvement, you are seeking will drive the types of changes you test and implement.

**Table :1 types of changes we test and implement**

| Reactive Change | Fundamental Change |
|---|---|
| Changes required to maintain the system at its highest level of performance previously achieved | Changes made to exceed the highest level of performance previously achieved |
| Made routinely to solve immediate problems or react to a special circumstance | Fundamentally alter how the system works and what people do. |

| Reactive Change | Fundamental Change |
|---|---|
| Typically take the form of a trade-off among competing interests or characteristics | Often result in improvement of several measures simultaneously |
| Impact is usually felt quickly | Impact is felt into the future |

Change concepts can provoke new ways of thinking but are designed to be abstract and context-free. Before they can be applied directly to making improvements, a concept needs to be turned into a specific idea that can be tested and implemented. The figure below illustrates this process.

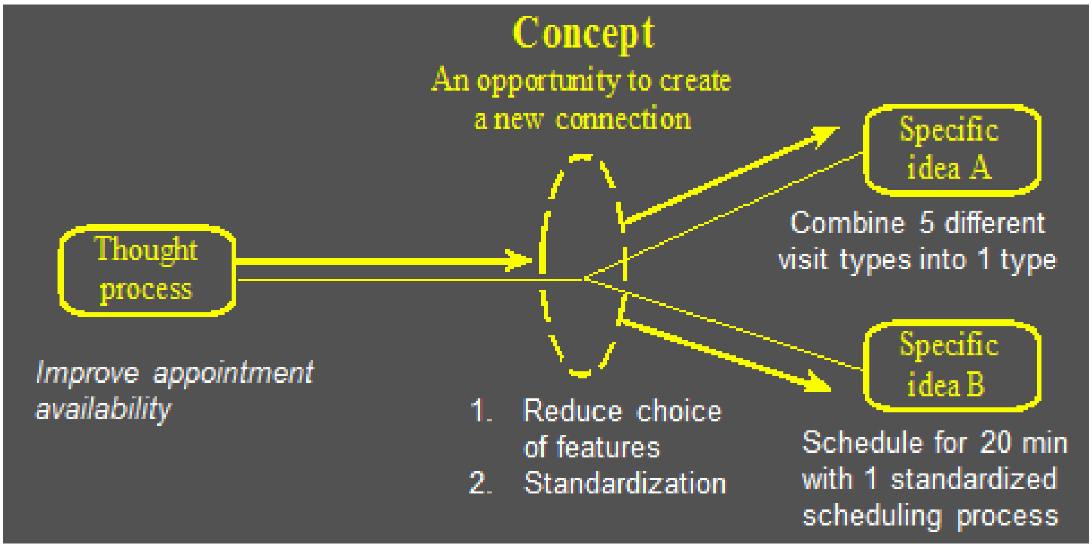


Figure 6: actionable measurement of new thinking

**Step 7: Test Changes**

Once you have developed ideas for change, your next series of steps in the improvement journey are to test on a small scale the impact of each proposed change, including identifying any negative consequences from the change. At the end of Step 7, your team should be prepared to**:**

1. Plan, test, document, and refine your first small scale, rapid cycle test of change.
2. Develop the Data Collection Plan for your first small scale, rapid cycle test of change.

The Plan-Do-Study-Act (PDSA) cycle is a powerful vehicle for testing, learning, implementing, and spreading. PDSA cycles can help you plan for, carry out, and learn from small tests of change. By starting small and using iterative, linked cycles, the PDSA framework helps minimize and mitigate common risks associated with problematic or failed implementation of changes. Try a test quickly; at your next team meeting, collectively ask and answer: "What change can we test by next Tuesday?" Additional reasons that small scale, rapid cycle testing is an effective way to manage change include**:**

**PDSA Cycle**

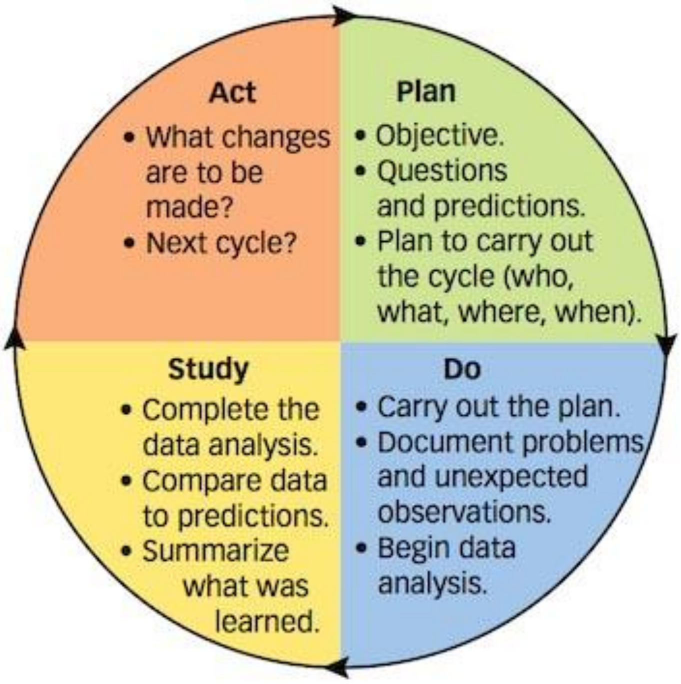


Figure 7: Plan-Do-Study-Act (PDSA) cycle

**<u>Steps in the PDSA Cycle (from IHI.org)</u>**

**Step 1: Plan**

Plan the test or observation, including a plan for collecting data.

**Step 2: Do**

Try out the test on a small scale.

**Step 3: Study**

Set aside time to analyze the data and study the results.

**Step 4: Act**

**Step 8: Implement Changes**

Step 8 occurs after an improvement team has developed and tested a change using PDSA cycles and is convinced by evidence from these cycles that that the change will lead to sufficient improvement. Step 8 is about making the change a permanent part of the system. Implementation is a commonly used term in relation to change, with various definitions covering a spectrum of steps. Implementation in the context of quality improvement is a narrower focus than how the term is commonly used: "The aim of this narrow scope of implementation is to make sure the infrastructure is in place to make the change long-lasting and successful. This includes issues such as training, documentation, standardization, adequate resources, and social considerations."

"Testing is about learning if the change will result in an improvement. Implementation is about how to make the change an integral part of the system."

As you did with developing and testing changes, implementation should be carried out as part of a PDSA cycle or series of cycles. However, assuming that testing has been effective, implementation PDSA cycles are expected to result in no failures. Here is a chart that can help you decide the scale of your PDSA cycles and whether the change is ready for implementation.

## Testing and Implementing a Change Idea

| BELIEF | COST OF FAILURE | Current commitment within organisation: No commitment | Some commitment | Strong commitment |
|---|---|---|---|---|
| Low degree of belief that change idea will lead to improvement | Cost of failure large | Very small scale test | Very small scale test | Very small scale test |
| | Cost of failure small | Very small scale test | Very small scale test | Small scale test |
| High degree of belief that change idea will lead to improvement | Cost of failure large | Very small scale test | Small scale test | Large scale test |
| | Cost of failure small | Small scale test | Large scale test | Implement |

Figure 8: Testing and implementing idea

**Step 9: Spread Improvements**

"The tipping point is that magic moment when an idea, trend, or social behavior crosses a threshold, tips, and spreads like wildfire." Step 9 is about spreading successful changes to other departments or areas of your institution, other colleges and universities, and/or even other sectors or disciplines. After a change has been reliably implemented (and is consistently achieving the desired outcome) in one context, the goal is to replicate the outcome of this change in a new context or setting.

**By the end of Step 9, you will be able to:**

1. to assess whether a change is ready to spread to other contexts or settings
2. develop and implement a plan for spreading changes.

| Self-Check -1 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. An opportunity is a situation in which it is possible for you to do something that you want to do. A. True B. True
2. Measurement in quality improvement allows us to understand whether we have reached our improvement aims. A. True B. True
3. Quality improvement requires a comprehensive understanding of the system or how the various processes work together to achieve outcomes. A. True B. False
4. When we create our family of measures for an improvement project, we always want to try to include a balanced set of measures. A. True B. False
5. Implementation is about how to make the change an integral part of the system." A. True B. False
6. you should be able to answer the following questions:
   A. What is the problem or opportunity for improvement?
   B. What data/analysis supports this?
   C. Why is this issue important?
   D. All
7. The knowledge, skills, experiences, and perspectives of a multidisciplinary improvement team are especially critical because**:**
   A. Systems and processes can be complex
   B. Creativity is necessary
   C. Team members have a stake in the outcome
   D. Processes involved are not often cross-functional
8. Measurement for improvement allows us to answer questions such as**:**
   A. What is the current state?
   B. How will not we recognize better when we see it?
   C. What are factors, such as processes and activities,
   D. Are the processes stable and reliable?

9. What types of measures are there?
   A. Outcome Measures
   B. Process Measures
   C. Balancing Measures
   D. All are correct
10. In the PDSA cycle, which order is correct?
   A. Study->Do->Plan->Act
   B. Plan ->Study->Do ->Act
   C. Plan->Act ->Study->Do
   D. Plan ->Do-> Study ->Act

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5points**

Answer Sheet-1

Name: ______________________ Date: ________________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

| |
|---|
| Score = ___________ |
| Rating: ____________ |

| Information Sheet-2 | Review personal work Performance |
|---|---|

**2.1. Review personal work Performance**

Performance management isn't simply a once-a-year evaluation. your supervisor all year round, you can make adjustments to your work performance as needed, and your If personal issues are affecting your job performance and you are.

This is a self-assessment of performance, over a specified time period, compared to objectives, business goals, a job description or other performance indicators. Employee Self-Assessment Examples in Customer Service**.** Improving Customer Service Through Employee Self-Assessment Appraisals:

Performance assessments and appraisals are a key part of this development. Developing your employees into customer service gurus can be a snap. Just use these sample phrases for performance appraisals.

- **Performance Appraisals for Employees Meeting Expectations**

If your employee meets expectations, acknowledge that with phrases on their performance review such as:

- ✓ Works very well with clients as well as all staff members
- ✓ Has a very warm rapport with everyone she comes in contact with
- ✓ Follows up with clients to ensure no one feels forgotten or lost in the process
- ✓ Clearly enjoys the “people” aspect of his position
- ✓ Consistently answers the phone with a smile and a friendly hello
- ✓ Readily admits when she doesn’t know the answer to a particular query
- ✓ Outlines the steps that she will take to resolve a problem
- ✓ Receives ongoing positive feedback from clients—both verbally and in writing
- ✓ Has become the “go to guy” for clients who seek his advice to solve problems
- ✓ Excels at providing timely feedback to even the most difficult customers
- ✓ Consistently gains necessary approvals and authorizations
- ✓ Is able easily to switch from English to Spanish and back again
- ✓ Is an empathetic and focused listener
- ✓ Skillfully overcomes customers’ objections
- ✓ Deals with challenging customers without becoming aggressive

- ✓ Has developed a loyal customer base and a high rate of repeat business
- ✓ Enjoys identifying "out-of-the-box" solutions for clients with special needs
- ✓ Skillfully manages all but the most challenging customer situations
- ✓ Knows when to ask for additional support from team management
- ✓ Is able to redefine the customer service process to meet clients' changing needs
- ✓ Overcomes objections in a logical and conversational fashion

- **Performance Appraisals When the Employee Needs Improvement**

If an employee needs improvement, you need to document that on their performance appraisal using performance feedback phrases such as:

- ✓ Receives ongoing substandard customer satisfaction scores
- ✓ Does not manage customer expectations by explaining reasons for delays
- ✓ Has difficulty saying *no* or tactfully telling customers that they must wait their turn
- ✓ Refers too many customer queries to management for final resolution
- ✓ Has received numerous customer complaints for failing to follow up as promised
- ✓ Cannot yet demonstrate sufficient knowledge of company products
- ✓ Misses opportunities for cross-selling and overcoming initial objections
- ✓ Is unwilling to adapt his tone and personality to fit a particular caller's style
- ✓ Argues and uses inflammatory language with customers
- ✓ Becomes frustrated when customers ask too many questions
- ✓ Displays sarcasm and alienates those looking for help
- ✓ Demonstrates condescending behavior when dealing with overly demanding callers
- ✓ Has little patience for customers with "dumb questions"

- **Employee Self-Assessment: Setting Goals on Performance Appraisals**

For the new year, set customer service goals high with customer satisfaction goals such as:

- ✓ Demonstrate total commitment to outstanding customer service
- ✓ Always exhibit creativity and flexibility in solving customers' problems
- ✓ Share information and resources readily
- ✓ Make sure that clients understand that you're on their side
- ✓ Never appear to talk down to or to patronize customers
- ✓ Exceed customers' expectations by providing timely feedback and follow-up

- ✓ Quickly address problems even with the most demanding customers
- ✓ Effectively prioritize your workload based on your customers' needs
- ✓ Share only as much information with a client as is necessary
- ✓ Refrain from speaking poorly of the competition
- ✓ Never permit customers to treat you disrespectfully
- ✓ Involve management whenever customers behave inappropriately
- ✓ Proactively inform customers of pending delays
- ✓ Never use pressure to close a deal or to unduly influence a customer's decision
- ✓ Always put the client's needs above your own
- ✓ Provide objective and timely advice to customers
- ✓ Tactfully tell customers *no* when their demands or expectations cannot be met
- ✓ Follow up with customers after the conclusion of a sale.

| Self-Check -2 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth one point.

1. In a personal work performance, Performance assessments and appraisals are a key part of development. A. True B. True.
2. In Performance Appraisals for Employees, clearly enjoys the “people” aspect of position is an Expectations. A. True B. True.
3. Performance Appraisals Needs Improvement. A. True B. True.
4. self-assessment of performance, over a specified time period, compared to objectives, business goals, a job description or other performance indicators. A. True B. True.
5. If your employee meets expectations, acknowledge that with phrases on their performance review. A. True B. True.

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5points**

Answer Sheet-2

Name: _____________________ Date: ________________

Choice Questions

1._________ 2. ________ 3. ________4. ________5. ___________

6._________ 7. ________ 8. ________9. _________10. _________

Score = ____________

Rating: _____________

| Information Sheet-3 | Record evidence of customer satisfaction and report to team members |
|---|---|

### 3.1. Record evidence of customer satisfaction and report to team members:

The customer satisfaction survey is the standard approach for collecting data on customer happiness. Customer satisfaction (CS) has become an important issue for commercial and public service organizations. The statute does not limit the Commissioner to record evidence in order that he may be satisfied that the internal revenue tax base been paid.

Whatever your picture of a satisfied customer is, customer satisfaction is typically defined as the feeling that a person experiences when an offering meets his or her expectations. When an offering meets the customer's expectations, the customer is satisfied.

Improving customer satisfaction is a goal sought by many businesses. In fact, some companies evaluate their salespeople based on how well they satisfy their customers; in other words, not only must the salespeople hit their sales targets, they have to do so in ways that satisfy customers. Teradata is one company that pays its salespeople bonuses if they meet their customer satisfaction goals.

- **Customer Satisfaction Strategies**

If customer satisfaction can be defined as the feeling a person experiences when an offering meets his or her expectations, then there are two critical ways to improve customer satisfaction. The first is to establish appropriate expectations in the minds of customers. The second is to deliver on those expectations.

We know that dissatisfied customers are likely to tell many more friends about their negative experiences than satisfied customers are about good experiences. Why? Because there's more drama in unmet expectations. A story about met expectations telling a friend about a night out that was average, for example is boring. Jan Carlson, a former Scandinavian Airlines executive, was famous for promoting the concept of "delighted" customers. Carlson's idea was that delighting customers by over exceeding their expectations should result in both repeat business and positive word of mouth for a firm. The fact that stories about plain old satisfaction are boring is also why influencer communities, such as JCPenney's Ambriel community, are so important. Influencers have new offerings to talk about, which are interesting topics, and other buyers want to know their opinions.

Establishing appropriate expectations in the minds customers is a function of the repurchase communications the seller has with them. A common saying in business is “under promise and overdeliver.” In other words, set consumers’ expectations a bit low, and then exceed those expectations in order to create delighted customers who are enthusiastic about your product. A seller hopes that enthusiastic customers will tell their friends about the seller’s offering, spreading lots of positive word of mouth about it.

- **Measuring Customer Satisfaction**

To measure customer satisfaction, you need to able to understanding what creates it. Just asking customers, “Are you satisfied?” won’t tell you much. Yet many companies often measure the satisfaction of their customers on the basis of only a few questions: “How satisfied were you today?” “Would you recommend us to your friends?” and “Do you intend to visit us again?”

Effective customer satisfaction measures have several components. The two general components are the customer’s expectations and whether the organization performed well enough to meet them. A third component is the degree of satisfaction, or to put it in terms we’ve used to describe exceptional performance, is the customer delighted?

To figure out if a customer’s expectations were met and they are delighted, more detail is usually required. Companies might break the offering into major components and ask how satisfied customers were with each. For example, a restaurant might ask the following:

- Were you greeted promptly by a host? By your server at your table?
- Was your order taken promptly?
- How long did you wait for your food?
- Was the food served at the appropriate temperature?

These questions assume that each aspect of the service is equally important to the customer. However, some surveys ask customers to rate how important they are. Other surveys simply “weight,” or score, questions so that aspects that are known to be more important to customers have a greater impact on the overall satisfaction score. For example, a restaurant might find that prompt service, good taste, and large portions are the only three factors that usually determine customers’ overall satisfaction. In that case, the survey can be shortened considerably. At the same time, however, space should be left on the survey so customers can add any additional information that could yield important insight. This information can be used to find out if there are customer service problems that a firm wasn't aware of or if the preferences of consumers in general are changing.

You will still find customer satisfaction survey cards that just ask, "How satisfied were you today?" "Would you recommend us to your friends?" and "Do you intend to visit us again?" The information obtained from these surveys can still be useful if it's paired with a more comprehensive measurement program. For instance, a sample of customers could be given the opportunity to provide more detailed information via another survey and the two surveys could be compared. Such a comparison can help the company pinpoint aspects that need improvement. In addition, the company has given every customer an opportunity to provide input, which is an important part of any empowerment strategy.

- **Complaint Management Strategies**

When buyers want to complain about products or companies, they have many ways to do so. They can complain to the companies they're upset with, tell their friends, or broadcast their concerns on the Internet. People who use every Internet site possible to bash a company are called *verbal terrorists*.

Should companies worry about verbal terrorists? Perhaps so. A recent study indicates that customer satisfaction scores could be less important to a firm's success or failure than the number of complaints it gets.

To measure the tradeoff between the two, customer satisfaction guru Fred Reichheld devised something called the *net promoter score*. The net promoter score is the number of recommenders an offering has minus the number of complainers.

Studies also show that if a company can resolve a customer's complaint well, then the customer's attitude toward the company is improved, possibly even beyond the level of his or her original satisfaction. Some experts have argued, perhaps jokingly, that if this is the case, a good strategy might be to make customers mad and then do a good job of resolving their problems. Practically speaking, though, the best practice is to perform at or beyond customer expectations so fewer complaints will be received in the first place.

Customers will complain, though, no matter how hard firms try to meet or exceed their expectations. Sometimes, the complaint is in the form of a suggestion and simply reflects an opportunity to improve the experience. In other instances, the complaint represents a service or product failure.

When a complaint is made, the process for responding to it is as important as the outcome. And consumers judge companies as much for whether their response processes seem fair as whether they got what they wanted. For that reason, some companies create customer service departments with specially trained personnel who can react to complaints. Other companies invest heavily in preparing all customer-facing personnel to respond to complaints. Still other companies outsource their customer service. When the service is technical, marketers sometimes outsource the resolution of complaints to companies that specialize in providing technical service. Computer help lines are an example. Technical-support companies often service the computer help lines of multiple manufacturers. A company that outsources its service nonetheless has to make sure that customer complaints are handled as diligently as possible. Otherwise, customers will be left with a poor impression.

| Self-Check -3 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth two points.

1. The customer satisfaction survey is not the standard approach for collecting data on customer happiness. A. True B. True
2. Customer satisfaction (CS) has become an important issue for commercial and public service organizations. A. True B. True
3. When an offering meets the customer's expectations, the customer is satisfied. A. True B. False
4. dissatisfied customers are not likely to tell many more friends about their negative experiences than satisfied customers are about good experiences. A. True B. False
5. To measure customer satisfaction, you need to able to understanding what creates it. A. True B. False
6. When a complaint is made, the process for responding to it is as important as the outcome. A. True B. False

***Note:* Satisfactory rating ≥6 points** **Unsatisfactory <6 points**

Answer Sheet-3

Name: ____________________ Date: _______________

Choice Questions

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

Score = ___________

Rating: ____________

**4.1. Contribute to the development, and improvement of quality service policies and standards:**

How to create and implement customer service standards within your business Customer service excellence should be a goal for all business owners and managers. Some would say *especially* for small businesses, who tend to rely more heavily on customer loyalty than huge corporations. However - as anyone who has ever made a New Year's resolution will tell you - having a goal in mind is rarely good enough.

Committing to implementing official customer service standards within your workplace is the only way to show true dedication to the goal and to ensure staff are also on board with your policies. It provides direction and uniformity to day-to-day interactions, while also highlighting to staff and customers that you take this very seriously.

Today we're going to run through the basics on implementing your very own customer service standards across your business and getting them down in writing.

- **Steps to develop, and improve of quality service policies and standards:**

**Step 1: Determine what your customers need**

to improve customer service within businesses quite a lot lately. One thing that always comes up is the importance of providing feedback opportunities to your customers. If you never ask, how will you know where you can improve?

Step one in developing your customer service standards is the perfect time to run through all the feedback you may have collected.

Some basic things you can survey your customers on (ask them to provide a score of 1 to 5, with 5 being the highest):

- ✓ Product quality and handling
- ✓ In store customer service
- ✓ Telephone customer service (including wait times on hold)
- ✓ Efficiency in addressing customer complaints
- ✓ Delivery times (if you deliver)
- ✓ Website functionality

- ✓ Website usability

Any area which doesn't score an average of five points will need your attention. Don't stress if the results aren't what you thought - just be thankful for the opportunity to change and improve.

**Step 2: Create a vision or mission statement**

What do you want your company to be known for? What is the key thing you want to provide? This will be your vision statement. You can word this statement however you like.

**Step 3: Create customer service policies**

With your information gathering and mission statement out of the way it's time to focus on creating policy. Depending on your business, there could be hundreds of potential items to address here. Most companies usually distribute these via an employee handbook to ensure everyone has access to the information.

So, how will you know which kinds of policies to introduce? It's unique to your business, however, a good place to start is by listing out all the different types of customer interactions that typically take place. For example, a sample list of areas for a retail business may include (There will be more areas to address - these are just some ideas to get you started):

- ✓ Cash handling
- ✓ Stock ordering
- ✓ Managing customer complaints
- ✓ Point-of-sale system training
- ✓ Ongoing inventory management

Once you have your initial list, create flow charts and guides for how all processes should run. Remember that this is an ongoing process and every time something new comes up, you should add it to your policy guide.

**Step 4: Train all employees in relevant customer service policies**

As mentioned previously, customer service standards and policies are usually distributed to staff in the form of an employee handbook. While this is best practice for your business, you shouldn't just leave it there.

An employee who only works the cash register doesn't really need to know about ordering stock, however, they will need to be carefully trained in all processes relating to their specific job. It's your responsibility to make sure this happens by introducing proper customer service training in the workplace.

- **Improving Service Quality Management**

When brands seek to refine their customer engagement strategy, a critical aspect is ensuring that contact center customer service operations are running smoothly. To achieve this, it is necessary to assess not only individual agent performance but also the quality management practices in place. Here are seven tips for improving service quality management in the contact center.

**Encourage agent feedback.** Agents are on the front lines of customer service and have a detailed knowledge of what customer expectations may be. Encouraging agent feedback regarding improved customer service practices is therefore crucial, while peer feedback can also encourage team building and allow agents to learn from peer experiences.

**Have agents listen to their calls.** During coaching sessions, agents should be given the chance to listen to their calls when discussing which points to improve. By breaking down the process and closely analyzing points such as tone, thoroughness, and ability to achieve first call resolution, agents can get a better sense of what their service looks like and make improvements.

**Send post-contact surveys after every interaction.** No matter what priorities are set in place in a contact center's customer service operations, the customer should always come first. This means that customer feedback is just as critical as any peer or supervisor feedback, and quality management demands consistent requests for feedback after each service interaction. Post-contact surveys should include questions that directly address the customer's needs and preferences with a free-response section for additional comments.

**Establish clear KPIs.** It is important for all contact center employees to know what KPIs to strive for, so establishing clear goals is necessary. Agents and managers alike should be able to view KPIs alongside their personal achievements, and tools such as gamification can motivate agents to deliver their best and meet their goals.

**Evaluate regularly.** Agents should be coached and evaluated on a regular basis to consistently aid them in improving their performance. For example, monitoring calls once a week and providing swift feedback allows agents to work on their performance regularly and improve before each subsequent call monitoring session.

**Give all agents clear and consistent standards.** All agents should have an equal chance for success, so it is important to set clear and consistent standards. Establishing clear points such as whether first call resolution is a top priority or reducing average handling time, which tools should be used and how, and what call scripts should be followed and when to deviate from a script are all steps toward setting clear expectations for agent success.

**Take a team approach to eliminate bias.** Quality management can be subjective, so taking a team approach to analyzing employee performance is a great way to eliminate bias. Having managers coach agents from another contact center team or exchanging peer feedback across teams are great ways to gain perspective across the contact center in a more objective manner.

Improving service quality management requires a team effort across a contact center while keeping the needs of the customer at heart when refining the process.

| Self-Check -4 | Written Test |
|---|---|

**Direction I:** Choose the best answer for the following questions. Use the Answer sheet provided in the next page: Each question worth two points.

1. Committing to implementing official customer service standards within your workplace is the only way to show true dedication. A. True B. True
2. Step one in developing your customer service standards is the perfect time to run through all the feedback you may have collected. A. True B. True
3. . Depending on your business, there could be hundreds of potential items to address here. A. True B. False
4. Agents are on the front lines of customer service and have a detailed knowledge of what customer expectations may be. A. True B. False
5. Quality management can be subjective, so taking a team approach to analyzing employee performance is a great way to eliminate bias. A. True B. False

***Note:* Satisfactory rating ≥5 points** **Unsatisfactory <5points**

**Answer Sheet-4**

Name: ______________________ Date: ________________

Score = ____________

Rating: _____________

**Choice Questions**

1.________ 2. _______ 3. _______4. _______5. __________

6.________ 7. _______ 8. _______9. ________10. ________

## References:


- Anderson, E. W., Fornell, C., & Lehmann, D. R. (1994). Customer satisfaction, market share, and profitability: findings from Sweden. Journal of Marketing, 58(3), 53-66.
- Anderson, E. W., Fornell, C., & Rust, R. T. (1997). Customer satisfaction, productivity, and profitability: differences between goods and services. Marketing Science, 16(3), 129-145.
- AS/NZS ISO 10002:2014 – Guidelines for complaint management in organizations.
- Cronin Jr., J. J., Brady, M. K., & Hult, G. T. M. (2000). Assessing the effects of quality, value, and customer satisfaction on consumer behavioral intentions in service environments. Journal of Retailing, 76(2), 193-218.
- Customer Service Training Manual IFTA Staff Training Part One 11th -12th October 2006.
- Mittal, V., & Frennea, C. (2010). Customer satisfaction: a strategic review and guidelines for managers. MSI Fast Forward 10-701. Cambridge, MA: Marketing Science Institute.
- The Ombudsman's Report 2009-10 Survey of Complaint Handling Practices in the Western Australian State and Local Government Sectors also provides further information on complaint handling practices in public authorities.
- http://www.des.qld.gov.au/contactus/feedback/?type=complaint.
- http://www.ombudsman.wa.gov.au/Publications/Guidelines.htm.
- https://prezi.com/wto8twqmxz0i/manage-networks-to-ensure-customer-needs-are-addressed/.


**Prepared By**

| No | Name | Educational Background | Level | Region | College | Email | Phone Number |
|---|---|---|---|---|---|---|---|
| 1 | Mulugeta Ayalew | Water Engineering | A | Amhara | B.P.T.C | 10qb4u@gmail.com | 0918143825 |
| 2 | Abebaw Tarekegn | Water Engineering | A | Amhara | B.P.T.C | abish182003@gmail.com | 0921668996 |
| 3 | Muhabie Gesit | Water Engineering | A | Amhara | B.P.T.C | muhabie2004@gmail.com | 0918083087 |