

SIRXSLS001

Sell to the retail customer

Learner Guide



Unit of Competency

Application

This unit describes the performance outcomes, skills and knowledge required to deliver quality customer service and sell to retail customers. It requires the ability to determine customer needs, match products and services to their needs, and facilitate a sale.

This unit applies to all retail sectors and business sizes from large format stores to small independents. It applies to retail personnel at all levels who play a role in engaging with customers with the purpose of selling.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Unit Sector

Cross-sector

Performance Criteria

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Establish customer needs	1.1 Connect with the customer within designated response times and establish rapport 1.2 Use questioning and active listening to facilitate effective two-way communication 1.3 Observe and determine appropriate level of interaction based on customer verbal and non-verbal cues 1.4 Determine and clarify customer preferences, needs and expectations
2. Provide advice on products and services	2.1 Use product and service knowledge to tailor options to specific customer needs, and offer alternatives when product is unavailable 2.2 Clearly explain and promote product and service features and benefits where relevant 2.3 Advise on promotional events where relevant 2.4 Provide additional information to address customer questions and objections 2.5 Offer comparisons to competitor product or service range as required 2.6 Collaborate with the customer to determine product or service option most suited to their needs 2.7 Take opportunities to upsell and cross sell products and services that enhance customer request and maximise profitability of sale
3. Facilitate the sale of products and services	3.1 Select and use appropriate techniques to close sale 3.2 Direct the customer to designated point-of-sale and process sale, as required, according to organisational procedures 3.3 Farewell customer on leaving, and invite to return 3.4 Provide any required after sales service according to organisational procedures

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

Reading skills to:

- Interpret:
 - detailed in-house and supplier product information documents
 - plain English documents that outline organisational customer service policy and procedures.

Numeracy skills to:

- Interpret basic fee information from in-house documents and complete basic pricing calculations.

Problem-solving skills to:

- Respond to customer objections and provide appropriate solutions to satisfy customer needs.

Technology skills to:

- Use technologies equipped with search functionality and information systems to source product and service information.

Assessment Requirements

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- Interact with four different retail customers to initiate and close the sale of different retail products or services
- Demonstrate the following during the above customer interactions:
 - appropriate communication
 - establishment and clarification of customer needs, wants and expectations
 - product and/or service knowledge
 - appropriate sales approach to sell benefits and features of products and/or services
 - overcome objections and close sales
 - upsell and/or cross sell additional products and/or services that complement the sale
 - promotion of customer loyalty and repeat sales.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- Appropriate body language for customer service
- Basic principles of positive customer service and sales
- Open and closed questioning techniques related to the sale of product and services
- Verbal and non-verbal cues indicating customer understanding of information
- Techniques for effective communication with customers of diverse backgrounds:
 - cultural diversity
 - special needs
- Sales techniques:
 - opening techniques
 - recognising buying signals

- strategies to focus customer on specific products and services
- selling add-ons and complementary products
- overcoming customer objections
- closing techniques
- Primary components of consumer protection laws that relate to selling products and services, especially organisational responsibility for supplying products and services as described or substituting suitable products and services when unable
- Primary components of privacy law, and actions that retail business must take to protect privacy of customer information
- For the specific retail sector:
 - professional service standards and protocols for retail industry personnel
 - attitudes and attributes expected by the retail industry to work with customers
 - different customer service needs and expectations
- for the particular retail organisation:
 - product and service knowledge:
 - product and service range offering
 - product specifications, features and benefits
 - designated response times for providing customer service
 - customer service procedures including recording of and storing customer details.

Assessment Conditions

Skills must be demonstrated in a retail environment. This can be:

- An industry workplace
- A simulated industry environment.

Assessment must ensure access to:

- Relevant documentation:
 - organisational policies and procedures for:
 - customer service
 - sale of products and services
 - resolving customer complaints

- collection and storage of customer details
 - organisational product information and price lists
 - supplier brochures, information sheets and price lists
 - promotional activity information
 - current plain English regulatory documents distributed by government regulators for:
 - consumer protection law
 - privacy law
- Customers with whom the individual can interact to sell products and services; these can be:
- individuals in an industry workplace, or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation
- Assessment activities that allow the individual to:
- work within commercial speed, timing and productivity
 - manage tasks and contingencies in the context of the job role.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume Implementation Guide - <https://www.serviceskills.com.au/resources>

1. Establish customer needs

- 1.1.** Connect with the customer within designated response times and establish rapport
- 1.2.** Use questioning and active listening to facilitate effective two-way communication
- 1.3.** Observe and determine appropriate level of interaction based on customer verbal and non-verbal cues
- 1.4.** Determine and clarify customer preferences, needs and expectations



1.1 – Connect with the customer within designated response times and establish rapport

Connect with customer

First impressions are important; you don't have long to make an impression on someone, perhaps only a few seconds – so make the right one. The right impression can help you build a professional relationship, help to make a sale and build customer loyalty. You should think about how you greet and interact with your customers.

How you greet people will depend partially on the particular circumstance, but some things to consider include good eye contact, a smiling facial expression and a good opener/introduction.

There are two main scenarios that you will experience when dealing with customers face-to-face. These are when a customer is approaching you at your position/station and when you approach a customer to offer help.

Scenario 1: customer approaches you

A good introduction/opener – 'Hello, thanks for stopping/coming in/coming by, I'm Sarah – is this your first time here?'

This welcomes the customer by:

- Expressing appreciation for their presence in the store/business
- Complimenting them for deciding to visit the store/business
- Personalising the conversation by providing the customer with their name
- Giving the customer a chance to respond – steer the conversation.



Scenario 2: you approach the customer

A good introduction/opener – 'Hello, I'm Sarah the advisor/expert in..., how can I help you today?'

- This gives your name which personalises the conversation
- Let's the customer know how you can help them
- Encourages them to speak and give you further information.

When responding to customers it is important you do it within the specified timeframe. Your organisation may have designated response times for customer queries, complaints, orders etc.

You may be involved in a range of communication methods including:

- Verbal:
 - Over the phone
 - Face-to-face
- Written:
 - Email
 - Letter

Rapid responses will be necessary if you are to:

- Ensure customer and employee satisfaction
- Maintain optimum levels of profitability
- Limit the risk of losing out to competitors
- Maintain business efficiency.

Creating rapport

Creating rapport is about using your interpersonal skills to communicate effectively with different people to build a relationship. If you have good interpersonal skills you will usually be able to talk with ease to a variety of people with differing backgrounds and at a wide range of levels. Your communication will be confident, eloquent and adaptable to suit different situations.

To establish rapport:

- Try and find something you have in common
- Use positive, confident and co-operative language.
- Be interested in what people are saying and ask questions to demonstrate this
- Interpret non-verbal and verbal messages and react accordingly or mirror their body language
- Your use of language, verbal or non-verbal – try to be accommodating and adapt your style
- Be aware of cultural differences:
 - Different cultures and communities have different euphemisms and accents, which you should bear in mind when speaking.
 - English can potentially be a second language.
 - Some words, terms and phrases may be offensive.



Activity 1A



1.2 – Use questioning and active listening to facilitate effective two-way communication

Using questioning skills

Using questioning and listening techniques effectively, will allow you to facilitate effective two-way communication. Knowing which questions to ask to determine the person's needs in a timely manner is an important skill. There are various different types of questioning techniques that you can use to for finding out different information.

Questioning techniques could include:

- Open questions allow other people to give a full description or expand on certain points. The best open-ended questions start with 'when', 'what', 'how', 'who' or 'where'.
- Closed questions (that predict a yes or no answer) are okay for gathering information, but bear in mind that they give no opportunity for you to discuss things.
- Either/or questions give a person two choices but restrict the respondent to those choices – you should only use these if you are certain that the answer is one or the other e.g. 'would you like this in the green or the blue?'
- Leading questions are suggestive and can sometimes be used to persuade e.g. 'what type of décor do you imagine in your new home?'



Listening

It has been said that people spend 25% of their time speaking, and 75% listening during verbal exchanges. It is absolutely essential that you demonstrate excellent listening skills in the business world. Effective communication will be necessary when meeting and interacting with customers.

You will need to be able to:

- Effectively comprehend information
- Maintain concentration and show enthusiasm
- Repeat what the other person has said, as evidence that you are listening attentively
- Maintain eye contact
- Resist the temptation to interrupt
- Practice turn taking during discussions.

It is also a good idea to keep a record of the key information discussed with colleagues. If you don't do this then there will be a risk of forgetting essential information.

Active listening

You cannot talk as well as listen. When someone else is speaking you should make it your duty to actively listen to what they are saying. This will help you to respond appropriately. Try to say less so that the person you are talking to can say more (and you can listen).

Active listening is a form of communicating; it requires the listener to feed-back what they hear to the speaker, rather than simply hearing what they say.

When listening actively, you should provide enough time for the speaker to tell their full story and offer a sufficient delay after they speak. Use this delay after they speak to think about what you will say – try to tune out any thoughts that occur while the other person is speaking.

Active listening usually involves either verbal or non-verbal feedback and is useful to demonstrate your understanding and empathy. When someone is listening to the words being spoken by another, they are also taking note of the way the words are being spoken.

Feedback can include:

- Verbal feedback:
 - 'Mmm' 'Yes'
 - 'I see'
 - 'Carry on'
- Non-verbal feedback:
 - Eye contact
 - Nodding
 - Reacting to what the person says through facial expression e.g. smiling, looking concerned etc.



Improving your listening skills

Ways of improving your listening skills:

- Interact with a wide variety of people and hone your skills
- Ensure that you aren't distracted
- Relax and actively consider what the other person is saying
- Remember the importance of patience
- Learn to identify the meaning of tonal variations and emphasis on particular aspects of speech
- Take courses on communication.

Activity 1B



1.3 – Observe and determine appropriate level of interaction based on customer verbal and non-verbal cues

Verbal and non-verbal communication

It is important to recognise signals within verbal and non-verbal communication. Different meanings can be inferred from different types of verbal and non-verbal communication. For example, if your voice is too loud when you are talking to a customer, you may come across rude and aggressive. If it is too low you may come across shy and unknowledgeable. There are lots of different elements to both verbal and non-verbal communication; some of these have been listed here.

Verbal communication is communicated through language and has the following signals:

- Volume and tone
- Syntax (word order/sentences)
- Emphasis (can alter meaning)
- Diction (choice of words)
- Pronunciation
- Inflection (rhythm of language).



Non-verbal communication is communicated through gestures and has the following signals:

- Eye-contact
- Facial expressions
- Posture e.g. an open posture is knees slightly apart, arms and legs uncrossed and leaning slightly forward
- Physiological and emotional reactions e.g. perspiring, blushing
- Dress e.g. casual, uniform all give different impressions.

Matching your non-verbal communication to your verbal communication can help you to create genuineness – for example, smiling while saying ‘it’s great to see you’. When they don’t match you can seem artificial.

Determining your level of interaction

You should be able to determine the appropriate level of interaction based on customer verbal and non-verbal cues. This means thinking about when to engage with a customer and when to leave them to browse, or to have time to think. You can generally tell the appropriate level of interaction from different signals a customer gives you.

Signals that mean you should reduce your level of interaction can include:

- Eyes averted
- Restless:
 - fidgeting
 - shuffling
- Saying thank-you after you have given them information – some people will do this to try and close a conversation
- Other phrases such as 'I'm just having a look'.

Signals that mean you should increase your level of interaction can include:

- Asking questions may mean they are interested in the product/service
- Looking around may mean they require assistance
- Lots of eye contact may mean they are waiting for you to elaborate.

Buying signals can mean a customer is thinking about buying a product and you should move to close the sale.

Buying signals can include:

- Nodding
- Saying yes
- Repeating benefits
- Asking for the price.

Activity 1C



1.4 – Determine and clarify customer preferences, needs and expectations

Customer needs, preferences and expectations

Identifying customer needs and goals is vital to selling your product or service. Once you know what the prospective client wants to achieve, you can then demonstrate how you can help them to achieve it through buying your product or service.

Helping prospective clients with their problems can also help you to demonstrate that your organisation cares about its customers.

To identify customer needs you can:

- Ask the customer/decision makers directly:
 - What challenges are they facing?
 - What goals do they need to reach?
- Do research:
 - Who are your target customers and their values and aspirations?
 - Why do they use the product/service?
 - Look at previous complaints
 - Read articles about the organisation, the market they are in etc.
 - Look at the competition.



Product preferences and quality expectations will be influenced by the type of consumer. Certain markets will be looking for a higher end quality or luxury. Other markets will mean something entirely different for quality. You should be able to gauge the quality expectations and product preferences of a certain type of consumer from the product that they ask about and further investigation on your part.

Persuasion techniques

Encouraging prospective clients to talk about their needs and goals, you will probably need to employ a few persuasion techniques.

Body language:

- Smile (also use on phone)
- Nod (also use on phone)
- Eye contact
- Use gestures (but not to many)

In conversation:

- Use prospect's name
- Ask questions strategically:
 - Start with questions they cannot say no to
 - Avoid questions you don't know the answers to
- Mirror your prospect's speech patterns and mannerisms (without blatant imitation)
- Reassure prospect about their concerns e.g. 'that's a really good question'

By talking to the client, and using some of the above techniques to persuade clients to divulge information, you can identify their needs and goals.

Organisational service standards

Many organisations will have specific service standards they wish employees to uphold. Standards will usually list behaviour of the staff to ensure quality customer service. Different scenarios may be listed – for example, face-to-face interactions, telephone interactions, leaving a voicemail, writing an email etc. You should become familiar with your organisational service standards.

Example standard:

- Greet customers in a courteous and professional way
- Listen to customers' requests and take timely actions to assist them – keeping them informed of any delays or unexpected problems
- Inform customers of the time their order/the service will take to process
- Regularly update customers about their order
- Respond to customer enquiries within 24 hours
- Finish all customer encounters in a courteous and professional way.



Activity 1D



2. Provide advice on products and services

- 2.1.** Use product and service knowledge to tailor options to specific customer needs, and offer alternatives when product is unavailable
- 2.2.** Clearly explain and promote product and service features and benefits where relevant
- 2.3.** Advise on promotional events where relevant
- 2.4.** Provide additional information to address customer questions and objections
- 2.5.** Offer comparisons to competitor product or service range as required
- 2.6.** Collaborate with the customer to determine product or service option most suited to their needs
- 2.7.** Take opportunities to upsell and cross sell products and services that enhance customer request and maximise profitability of sale



2.1 – Use product and service knowledge to tailor options to specific customer needs, and offer alternatives when product is unavailable

Product and service knowledge

Your organisation may have a range of products or services that you could offer to a customer. It is important though, that you pick the best match for your customer.

You will need to use the knowledge you have acquired of your organisation's products and services to be able to describe the product and service range, the specifications, features and benefits. This knowledge can also be drawn upon when tailoring a product to specific needs or offering alternatives which you believe would suit the customer if a particular item is unavailable.

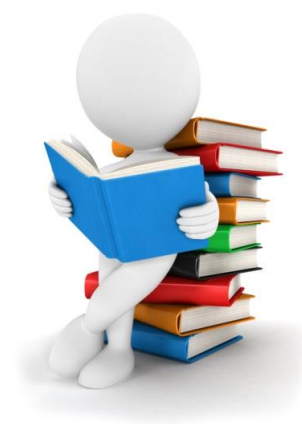
For example, a body care store may sell a variety of products for dry skin. A customer requests a body lotion which is hypoallergenic as they have sensitive skin prone to eczema. You will need to narrow down your products to be able to find a suitable one for the customer.

If a product is unavailable, you may need to offer alternatives which could satisfy the customer. This can often happen if a customer has tried something and the line has been discontinued. You may be able to recommend an alternative by asking the customer what it was they liked about the product so you can find something similar. For example, the coconut scent of a body wash was something that stood out for a particular customer, so you could offer alternatives e.g. body washes and soaps with a coconut scent.

Providing current and accurate information helps to maintain a good reputation and demonstrates your integrity. You may need to carry out additional product and service research. If this is the case, you should politely explain this to the client and contact them at an appropriate scheduled time to discuss options and next steps further. You may need to keep a diary of appointments or input them onto your organisational database. Ensure that this is updated accurately after each successful appointment made with a prospect.

Research may include:

- Attending trade shows
- Attending product testing
- Reading general and trade media and supplier information
- Reading reference books
- Taking up memberships of associations and industry bodies
- Talking to/networking with:
 - colleagues
 - product suppliers
 - other retail organisations
- Using the Internet.



Trade shows act as a form of business-to-business marketing enabling organisations to find retailers to stock their product. Organisations can buy booth space and sell units of their products. They can be useful for keeping you up-to-date about emerging products.

Reading general and trade media and supplier information may include information about locations of manufacturers, production methods, distribution and different markets for the product. Reference books can give you a variety of information on particular industries and products.

Taking up membership of associations and industry bodies means information is sent to you on a regular basis and you may also have the opportunity to join in special events that could be good for increasing your knowledge in relevant areas.

Talking to product suppliers may enable you to find more out about the industry, what is going well, if there are any problems, what the upcoming trends are etc.

Using the internet is a simple and quick method for research that can help you when looking for specific information.

Recording customer information

You may need to record information over the phone, via email or face-to-face. This may involve asking a customer to fill out a form or filling out a form for the customer. Your organisation may have a template to use as a guide.

A uniform approach to completing documentation ensures that documentation can be easily accessed and read by everyone who needs it. Organisational policies and protocols are implemented to ensure that this is the case for as much paperwork as possible and can benefit everyone involved.

It is important to follow organisational standards as this ensures that:

- Documents are received correctly
- Documents are sent to the right person
- All required documents are gathered
- Documents are in the appropriate format and include all required information
- Documents are handled correctly.

Documentation policy

Your organisation will probably have protocols on documenting client's information. You should abide by these at all times.

These may include protocols on:

- Filing and indexing
- Security
- Circulation
- Confidentiality.



You may use a variety of systems to document files including:

- Manual and computer filing
- Data base
- Management of computer directories.

Computer records

If recording information in a computer file you need to be aware of the possibility of typos being inputted into the file – it is easy to hit a different key to the one you intended and make a mistake on the file.

Manual records

For manual records, you won't have to worry about typos, but you will have to take care with handwriting to make sure it is legible. If you have to write in a hurry and you know that your handwriting is not the best, consider writing a draft on a piece of scrap paper which you can write up after you have finished with the client.

Accuracy

Your organisation may have procedures to help you with accuracy, but here are some general tips and ideas:

- Read through and check you have all the information correct (you could ask the client if on the telephone or face to face whether you have the correct information).
- Be aware of different spellings e.g. Stuart and Stewart and ask the customer to avoid confusion.
- Try to avoid using abbreviations unless everyone is in agreement and has full knowledge of the meanings.
- Do not rush – if you rush and make a mistake it will take longer to rectify in the end.



If the client has filled in the form you may have to interpret what they have written. If there is any aspect of the information that you do not understand, it may be a good idea to ask them for confirmation either at the time or later via email or telephone.

Activity 2A



2.2 – Clearly explain and promote product and service features and benefits where relevant

Products and service features and benefits

Products and services have different features and benefits. This will depend on your industry, organisation and product/service you are selling. You should ensure you are familiar with the products features and benefits so you can sell effectively to customers.

Features are statements about a product which tell the customer its:

- Appearance
- Components
- Capabilities

Benefits show what the product can do for the customer. For example, a mobile phone feature might be that it has 4G internet connection. A benefit of that phone would be that the 4G internet connection would mean you could use it to navigate around a city centre using Google maps – preventing you from becoming lost.

Clear explanations

When you are clear and concise, you provide information without room for misinterpretation in a timely and efficient way.

Being clear and concise means:

- Speaking at a reasonable pace, for easy comprehension
- Varying the tone and place emphasis on important points
- Speaking at a good volume, so that everybody can hear
- Articulating your words, for general understanding
- Using uncomplicated language
- Paying attention to your audience
- Acting positively for the achievement of desirable outcomes (especially when dealing with prospective customers)
- Not dominating conversations
- Not waffling or repeating yourself.



Diverse backgrounds

It is important to recognise that we live in a multicultural world. The 2006 Australian Census revealed that 44% of Australians were either born in a foreign country or had at least one foreign parent. There has also been a campaign to increase the migration of skilled workers from countries such as Britain, India and China during recent years. You can expect to meet people from different backgrounds and locations, no matter your line of work. It is best to openly acknowledge and show a reasonable interest in people's unique characteristics, to avoid any feeling of awkwardness and trepidation when communicating.

Expect to encounter differences in:

- Culture
- Race
- Language
- Gender
- Sexuality
- Age
- Religious beliefs
- Customs and traditions
- Physical and mental ability
- Socioeconomic backgrounds
- Values and views
- Lifestyles.



Respecting the differences

People from different backgrounds will hold unique beliefs about the appropriate means of carrying out business. Some foreign workers will be guarded and reserved upon meeting for the first time. You may be expected to follow conventions in the means of communication. It is important to find out as much as possible about such differences, so that you are properly prepared.

Variations in verbal communication include:

- Use of irony
- Implications of laughter
- Use of different languages
- Confidence in articulation.

Variations in non-verbal communication include:

- Different levels of sensitivity regarding personal space
- Different forms of greeting
- Specific mannerisms
- Differences in posture
- Different views on the importance of punctuality
- Differences in the expected means of communication with women.

Minimising chances of misunderstanding

To minimise the chance of misunderstandings you will need to use simple words and gestures. You will need to be patient and recognise that meanings of words, gestures and other non-verbal communication will differ. You may also have to clarify things more often than you are used to.

What are the basic strategies that can be used to overcome language barriers?

- Find out which languages are spoken in the countries where you are working – Be aware that there distinct regional variations in the languages spoken in some countries
- Show a willingness to engage with the language – Launch promotional campaigns in the language and use appropriate phrases during public communications
- Translate documents into the languages understood by your workforce
- Don't belittle anyone if they are unable to understand what you are saying – Remain patient and provide easily-understandable explanations
- Be prepared to ask for clarification if you are unsure of the meaning of a certain word or expression – The majority of people will respond positively and take the time to explain
- Enlist the professional assistance of interpreters and cultural experts
- Use technology such as Google Translate, Linguee, and Word Lens
- Don't use jargon if you are worried that it won't be understood
- Communicate messages visually, for shared understanding
- Learn some friendly phrases to use during casual conversation – People will appreciate the time taken to learn their language and be more receptive to your business
- Exercise caution over the use of gestures – There will be a risk of causing unintended offence.



Simple words

Take time to carefully choose your words when speaking to someone who does not speak the same language as you, as this can go a long way to help their understanding. Think about how you can simplify something – for example, ‘accrue’ would become ‘add’, ‘apparent’ would become ‘clear’ and ‘a number of’ would become ‘some’.

General communication techniques:

- Speak slowly and clearly
- Use short simple sentences
- Use a normal volume
- Put things in different ways using different words to help understanding
- Prioritise and sequence instructions
- Avoid jargon
- Avoid metaphorical/abstract language
- Listen carefully.



Gestures

Gestures can be put to good use when there are language barriers. This is because they are often universal. You can gesture with your body (e.g. arms crossed), your hands (e.g. thumbs up to mean okay) or your face (e.g. to indicate feelings like happiness).

Types of gesture:

- Iconic gestures – these are gestures that represent object attributes, spatial relationships and actions e.g. using your fingers to suggest smallness
- Deictic – these are gestures that indicate object of location e.g. pointing to someone
- Metaphoric – communicates an abstract idea into a more concrete gesture e.g. making a v with fingers for victory
- Beat – these gestures do not contain semantic meaning but are used in natural speech.

Other tips for overcoming language barriers

The best ways of dealing with cultural differences:

- Learn as much as you can before meeting with somebody from a different culture – There may be restrictions on the amount of time available before meeting. However, you are encouraged to find out the basics in terms of language and conventions
- Adopt a neutral manner until you are absolutely sure of the appropriate communication – There will be a risk of failing to recognise when you have made mistakes while interacting with people from different cultures

- Don't make any disparaging remarks – It is sensible to establish common ground and shared points of reference. Don't say anything that could be deemed as offensive
- If you're worried that you have caused offence then ask and take the appropriate steps to remedy the situation – Foreign workers may be relieved to discover that you are unaware of the reasons for any offence. They may be prepared to accept your explanation and move on
- Be particularly careful when attempting to promote and sell products/services – There are distinct differences in acceptable means of selling products and services in different cultures.

There are a variety of steps that we can take to increase the effectiveness and impact of communication:

- Maintain direct eye contact – This may be a struggle at first. You may have a tendency to be distracted and turn your thoughts elsewhere during conversations. However, direct eye contact should be maintained for positive perceptions of confidence and honour
- Write messages down – There is a potential for protracted conversations in the workplace. We may forget essential messages if we don't record them on paper. Note taking is also a very good way of showing that you have an interest in what the other person is saying
- Practice your listening skills whenever possible – Think about what the other person is saying, rather than formulating your response while they are talking. Other people will appreciate it if you listen attentively and think actively about what they are saying
- Stay positive – People are unlikely to want to be in your company if you always seem miserable and point out the down-sides. Make the effort to develop a positive attitude and enjoy the rewards
- Recognise the difference between confidence and hostility and act accordingly – You will make the right kind of impact if you clearly articulate your thoughts and feelings. However, it is also important to take account of other people's viewpoints and pay due respect
- Read books and take any training opportunities offered by your organisation – There are a number of expertly written books on the topic of effective communication. You may also have the opportunity to attend sessions on public speaking and general principles of interaction.

Activity 2B



2.3 – Advise on promotional events where relevant

Advise on promotional events

Part of your organisation's marketing plan may involve promotional events. These types of events can help to draw customers in with promises of limited items or special coupons e.g. when a customer buys something in store or online.

In store-events are fantastic ways to sell products and attract customers. They give customers something fun and different, generating not only short-lived excitement but can often result in an emotional connection from customers making them more likely to return.

Events may be major or minor, major events will generally take more planning but draw in more customers. Minor events will take less planning and generally draw in fewer customers. You should be able to advise on promotional events – this may mean giving customers information about events going on in the near future, or giving supervisors/managers ideas for events.

Example events include:

- Late night shopping – stay open for an extra two hours and offer food and drink to customers
- Fundraising event – where a percentage of profits that night go to a specified charity
- Demonstrations – demo a new line of products
- Pamper day – hire a therapist to come and give free short neck massages to customers
- Competitions with prizes
- Classes/workshops in-store or at schools e.g. art, crafts, cookery, fashion (and you could offer coupons/goodie bags)
- Scavenger hunts around store with a prize for the person who finds the most items – encourages people to explore the whole store
- Loyalty cards or stamps – customers get a discount or freebie when they visit or buy from the store a set number of times
- Network to create cross promotions with other businesses with mutual benefits e.g. swapping brochures/flyers, products, or create a bundle – for example, ice-skating, scarves, hat, gloves and dinner bundle.



You will need to be brief when you give customers information to events, giving them the important information such as the time, date, location and what the event is. For example, 'come along to our pamper day, tomorrow, in-store and you can get free neck massage with this coupon'.

Activity 2C



2.4 – Provide additional information to address customer questions and objections

Addressing customer questions and objections

You may be faced with customer questions and objections about a product or service. When a customer objects to what you want to sell them, you will need to find out what it is they object to specifically.

Objections may include:

- Cost – this can be overcome by:
 - encouraging the customer to see the unique value of the product
 - offering a payment plan
 - creating a package/bundle to give customers more value
 - Making a comparison to one of your competitors to show your customer the value of your product
- Time – this can be overcome by:
 - give people a schedule so customers will know long it will take to get an end result
 - give an estimated time to install and use the product
 - compare to competitor products
- Too difficult to use (people may think your product seems difficult to use) – this can be overcome by:
 - conducting in-store product demonstrations
 - including a video of how to use the product
 - notifying customers of your after-sales support
- Worried product is not going to meet expectations – this can be overcome by:
 - explaining your policy on returns
 - giving a trial offer
 - offering a guarantee.

Resolving problems

Occasionally customers will want you to resolve problems they have had with a product or service. In these instances it is best to apologise and see if you can help find a solution to the issue. Customers may just want to complain either formally or informally, or they could want action.

To resolve a problem:

- You need to politely ask what they want you to do
- Provide a possible solution or alternative
- Assure the customer that the issue will be dealt with – try to say this with resolve and determination
- Be positive and tell the customer what can be done not what cannot be done.

It is important when dealing with any query or complaint to take the customer seriously and value their comments. The way in which an employee deals with the complaint directly affects the level of customer service given by the organisation.

Customers make complaints about all manner of issues, including:

- Faulty products
- Poor service
- Poor communication
- Unprofessional employees:
 - rude/impolite
 - use of inappropriate language
 - inappropriately dressed
 - unhygienic
- Dirty/poor facilities
- Health and safety matters.



When processing the initial stages of a complaint, you need to give the customer a positive experience. There are several things you should consider when attempting to resolve a customer problem. These have been outlined below.

Acknowledge the complaint

Whether or not you agree with the customer, you must always accept that they are making a complaint and let them know.

Be magnanimous

Do not take the complaint personally. It is not a personal attack on, unless it is a direct complaint about you and in which case the customer will probably want to make the complaint to a supervisor. Remain calm and indifferent.

Apologise

Say that you are sorry for the issue that has caused the customer to make a complaint. For example, “I am sorry that you feel your lunch service was slow.” You are not agreeing with them, but you are recognising their concerns and acknowledging that their feelings matter.

Remain positive and polite

Your attitude is directly linked to the customer's. If an angry customer is met with a negative attitude, their attitude will get worse and will give them something else to complain about. Your positive attitude may help to calm the customer down and will make the experience much easier for them.

Listen to the customer

A customer that feels strongly enough to make a complaint wants to be heard. Do not interrupt and listen to all they have to say before responding. This will make them feel valued and also gives you the opportunity to find out exactly what the issues are. You will then be able to judge whether or not you can resolve the matter or whether it needs to be referred elsewhere.

**Offer solutions and options**

If you are able, and have sufficient authority to do so, offer solutions to resolve the matter, focusing on what you can do for them and not what you cannot.

Document and record details

Dependent on the nature of the complaint, and your role and authority within the organisation, you may have to follow complaints recording procedures. Even if you have to refer the complaint elsewhere, it is still best practice to record the details of the customer and outline of the complaint, so that you have a written record of the complaint from its very beginning.

Legislation

Whilst some queries and complaints may be simple and straightforward to answer or resolve, you may come across serious problems that may be breaches of legislation. It is important to understand the relevant legislation to deal appropriately with a complaint of this nature.

The Competition and Consumer Act 2010 (CCA)

The CCA was introduced to promote and encourage fair trading and competition for businesses across the whole of Australia, and to enhance consumer welfare by providing consumer protections. It strives to improve the relationships between suppliers, wholesalers, retailers and consumers.

The CCA covers:

- Product safety and labelling
- Unfair market practices
- Price monitoring
- Industry codes
- Industry regulation – airports, electricity, gas, telecommunications
- Mergers and acquisitions.

The CCA is regulated and enforced by the Australian Competition and Consumer Commission.

Australian Consumer Law (ACL)

The ACL is Schedule 2 of the CCA. It commenced on 1st January 2011 and applies nationally to all businesses in all sectors.

The ACL is a set of national laws covering:

- Unfair practices
- Consumer rights when buying goods and services (conditions and warranties)
- Product safety and information
- Liability of manufacturers for goods with safety defects offences
- Misleading or deceptive conduct
- Unsolicited consumer agreements (door to door sales, telesales).



It also provides:

- Simplified national rules for lay-by agreements
- New penalties, enforcement powers and consumer redress options.

Consumers' rights

The ACL requires businesses to provide consumer guarantees for the goods and services they sell. The consumer guarantee is a set of standards that must be met by goods and services purchased by consumers. The guarantees are different for goods and services.

Businesses providing services guarantee that their services will be:

- Provided with due care and skill
- Fit for any specified purpose (express or implied)
- Provided within a reasonable time (when no time is set).

The guarantees also vary between manufacturers/importers and businesses that sell goods, however there are a number of common ones.

Manufacturers, importers and businesses that sell goods guarantee that their goods:

- Are of acceptable quality
- Have been accurately described
- Satisfy any express warranty
- Have spare parts and repair facilities reasonably available for a reasonable period of time, unless the consumer is advised otherwise.

If the standards are not met, the business must provide the consumer with a remedy.

A remedy may be:

- A repair
- A replacement
- A refund
- Compensation for any subsequent loss.

Exceptions to consumer guarantees include:

- Financial products
- Services/contracts for insurance
- Professional services provided by a qualified architect or engineer
- Goods or services costing more than \$40,000 that are usually for business purposes.



Whilst consumers have rights, they are not limitless. A business only has to provide a remedy if they fail to meet one of the terms of the guarantee.

A remedy may not be required if a consumer:

- Changes their mind, decides they do not like the purchase or has no use for it
- Finds the goods or services are cheaper elsewhere
- Has damaged the goods by using them in a way that was unreasonable.

More information about consumer guarantees can be found on the ACCC website at:

<https://www.accc.gov.au/business/treating-customers-fairly/consumers-rights-obligations>

Refunds and returns

Many customer complaints will be regarding refunds and returns. It is important that your organisation adheres to legislation regarding these policies.

It is unlawful for a business to display signs that read:

- No refunds
- No refunds on sale items
- Exchange or credit note only for the return of sale items.

Dealing with customer complaints

If a customer requests a remedy for goods or services that do not meet the guarantees, your organisation is legally obliged to provide it.

If an organisation does not provide the relevant remedy, the customer can:

- Report the problem to the ACCC or their local consumer protection agency
- Have the matter heard in their local small claims tribunal or magistrates court.

The ACL replaced a number of individual State and Territory fair trading and consumer protection laws, in order to ensure consumers across the whole of Australia enjoy the same rights and protections, however legislation specific to each State and Territory does still exist. All information can be found on the ACL website.

Treating customers fairly

When dealing with customer complaints it is essential that all customers are treated equally and there is legislation in place that ensures you do.

Disability Discrimination Act 1992 (DDA)

Disability discrimination is the act of treating people with a disability less fairly than those without a disability and/or when relatives, friends, co-workers, and associates of people with a disability are treated less fairly.

The DDA exists to protect everyone in Australia from discrimination based on disability and to encourage community and economic participation by the widest possible range of people.

A disability is defined as:

- Physical
- Intellectual
- Psychiatric
- Sensory
- Neurological, and
- Learning disabilities
- Physical disfigurement
- The presence in the body of disease-causing organisms.

The Act covers people with a disability that they:

- Have now
- Had in the past (mental illness, for example)
- May have in the future (a family history of a disability which a person may also develop, for example)
- Are believed to have (if it is suspected that someone has AIDS, for example).

The following people are also protected by the DDA; those that:

- Are accompanied by an assistant, interpreter or reader
- Are accompanied by a trained animal, such as a guide or hearing dog
- Use equipment or an aid, such as a wheelchair or a hearing aid.

Buying goods and using services

A person with a disability has the same rights as someone without a disability when buying goods and using and accessing services and facilities. Services and facilities include:

- Shops and department stores
- Cafes, restaurants, pubs
- Places of entertainment
- Banks, credit unions, building societies
- Lawyers and legal services
- Sports and social clubs
- Public transport
- Dentists, doctors, and hospitals
- Government-run services.



Under the DDA it is against the law for providers of goods, services and facilities to discriminate against a person with a disability. For example, a restaurant cannot refuse to serve a blind person on the grounds that they have a guide dog.

Protection from discrimination due to physical or mental disability is also provided by the Fair Work Act 2009.

Activity 2D



2.5 – Offer comparisons to competitor product or service range as required

Competitor product or service range

You will need to remain on top of competitor product or service range to be able to offer comparisons between your product/service and your competitors. Offering comparisons to competitors shows your knowledge and can act as a persuasive device, helping you to sell your product or service.

Competitive products are not necessarily products which have exactly the same features as your product, or solve exactly the same problems that yours does, though they can be.

Products may be in direct competition with each other – for example, Pepsi and Coca-Cola. Products may be substitute products – for example, products which have the same benefit but use different means to do so. For example, a traditional telephone using the landline or a cell/mobile phone. Similar products perform similar functions but are used in different contexts or for different purposes – for example a car washer and a dishwasher are both automatic cleaning machines – one is used for cars and the other for dishes.

You will not only need to know what products are competitive with yours, but also how they compare to yours. This involves looking at the advantages and disadvantages of each. For example, your product may have newer or additional features to your competitor's. It may offer value for money, or suit a particular demographic better than your competitors. For example Amazon Fire kids edition or LeapFrog tablet may be better options for young children than an iPad.

You should also think about the most important elements for success and compare them– for example:

- Product/service range
- Costs
- Customer service
- Distribution/service speed

Understanding the competition

To understand your competition you also need to understand where your organisation fits in. Know what your organisation does differently – what is the brand? To analyse this aspect you should make comparisons between your organisation and your competitors.

You could analyse:

- Campaigns
- Hiring activity
- Investments
- Partnerships
- Press releases
- Interviews with managers.
- Website information.
- Product performance.



Activity 2E



2.6 – Collaborate with the customer to determine product or service option most suited to their needs

Collaborating with customer for best outcome

You should try to make sure customers have a positive experience when trying to sell products to them. This means determining the best product or service option most suited to their needs.

Basic principles of customer service:

- Listen to customers and share their ideas
- Treat each person as unique – do not be a robot
- Be honest about what you know (and ask for help)
- Be empathetic – to understand customer needs
- Know your product/service really well
- Be timely and efficient in providing your service.



You should explain the range of products on offer at your organisation and work with the customer to determine their needs by asking them a series of questions. The types of questions you ask will depend on what sort of products you sell. For example, a florist may like to ask things like who the flowers are for and what occasion is it? A customer at a florist may have the option of a potted plant for indoors or outdoors, or a bunch of fresh or dried flowers.

Example

A customer comes in and says they are looking for some flowers for a wedding. The retail representative may then congratulate the customer and ask a few questions to get more information and to work with the customer to find the best option.

- Sales Rep: When is the big day? – This could be important if a customer is having a last minute wedding as there may be time constraints. Options may also be limited in certain seasons, or the customer might be looking for something which would go with a particular season.
- Not long now then! Where are you having it? – This keeps the customer engaged and could lead the customer to divulge more information that might help with the sale.
- Let the customer know what you offer – ‘So we can create bridal bouquets, posies, table flowers, corsages, buttonholes, cake toppers, hair accessories, what type of thing are you looking for? – This is quite an open question and could encourage customers to speak about their ideas, budget etc.
- You can ask more specific questions now such as ‘what type of flowers were you thinking? Have you thought about colours and theme?’ to narrow down the choices.

Activity 2F



2.7 – Take opportunities to upsell and cross sell products and services that enhance customer request and maximise profitability of sale

Taking opportunities to sell

You will need to keep on the alert to seek out opportunities to assist customers when needed. This may be obvious or not so obvious, and how you go about it will depend on your organisation and role. For example, if you work in a retail store, you should walk around the store to ensure you make your presence known. This way, customers can get your attention if needed.

You might be able to spot several opportunities for assisting customers – for example:

- A customer asks you a question
- A customer is looking around trying to catch the eye of a staff member
- If a customer is looking thoughtful or confused
- A customer is complaining – you may be able to turn this around by being really helpful and offer the customer particular assistance/attention.



Cross-selling and up-selling

Cross-selling and up-selling are ways to maximise the profitability of a sale and enhance customer requests.

- Cross-selling is where the sales representative sells an additional product to the customer as well as the original product the customer wanted – for example, a bank may sell a savings account and holiday insurance.
- Up-selling is where a sales representative sells a higher end version of a product than the customer originally wanted – for example a higher spec television.

The approaches to each of these selling methods are different.

When you are cross-selling you are identifying the customer's needs (of which you may find there is more than one). In this case you can recommend an extra product e.g. an 'add-on' product which is linked e.g. headphones to go with a games console, or a totally different product e.g. sweets at the counter.

When up-selling, you need to be able to build value into the product so that the customer considers upgrading it. For example, cars come in basic forms with many additional features that you can upgrade to. These range from different paintwork and seat material to the entertainment and navigation system options. For these customers, it can work to paint a picture for them about what it would be like to buy a car with these features. Built in Sat Navigation System is really good for exploring new places. A full entertainment system will mean the kids are never bored on long journeys etc.

Looking approachable

Customers should feel that they can come up to you and ask you anything. Part of the challenge here is to look approachable.

To look approachable:

- Do not stand around having personal conversations with colleagues when customers are about
- Do not become distracted by mobile phones e.g. texting, messaging, searching internet, listening to music etc.
- Make sure you are at your designated point e.g. cashiering desk, returns desk, the floor so customers have the opportunity to find you.
- Do not look overly busy or rushed as people might not want to disturb you with their queries, or may interpret this as you being rude.
- Make an attempt to look professional and friendly at all times e.g. catching the eyes of customers, smiling, presentable in line with organisational requirements.



Activity 2G



3. Facilitate the sale of products and services

- 3.1.** Select and use appropriate techniques to close sale
- 3.2.** Direct the customer to designated point-of-sale and process sale, as required, according to organisational procedures
- 3.3.** Farewell customer on leaving, and invite to return
- 3.4.** Provide any required after sales service according to organisational procedures



3.1 – Select and use appropriate techniques to close sale

Closing techniques

Closing techniques are about giving the customer the final nudge to actually buy the product.

Traditional closing techniques include:

- Creating urgency:
 - I can give you a discount if you buy today
 - This is the last one/there are only a few left and they're going quickly
 - I can fast track your order today
- Closing summary:
 - A summary can stress the value and benefits of the product
 - 'So you would like the iPad Air 2 with touch ID technology, faster wireless, 10 hours battery time and Apple care package'.
 - This is convincing as it lays out for the customer all the aspects of the product.



The above more traditional techniques may seem slightly too predictable and sales-like. A more modern approach is to think of the closing as just another part of the sales process.

In this process you should both discover the customer's needs and communicate how you can solve their needs in a satisfactory and affordable way. If this has been achieved you should find it easy to close the sale and you can simply ask the customer directly if they are ready to buy.

Asking the right questions can mean you develop a desire in the client while simultaneously eliminating all objections to the purchase.

Probing questions are good for finding out more information about the client's needs as they ask for more information on something, for example, 'tell me more about that'. Probing often uses open-ended questions that allow a client to give a full description or expand on certain points. The best open-ended questions start with 'when', 'what', 'how', 'who' or 'where'.

Questions – for example, 'in your opinion does this product/service help you with your problem?' – this allows you to find out what the customer thinks of the product/service while giving you the opportunity to carry on trying to convince the customer if they say no.

Activity 3A



3.2 – Direct the customer to designated point-of-sale and process sale, as required, according to organisational procedures

Processing a sale

A point of sale is a place where a transaction takes place; usually the area around the cashier/counter where payment is made before a customer leaves with their goods or services. You should direct the customer to this point of sale by either showing them where to go or taking them to it. Then you should complete the transaction by following your organisation's procedures.

Processing the transaction may include:

- Taking the item and scanning it or inputting its code
- Gift wrapping
- Reading or calculating a price
- Asking for payment
- Asking if the customer would like to pay by cash or card
 - If cash give change
 - If card:
 - check if you can accept it
 - ask for contactless if appropriate, if not hand over the card reader and ask customer to put in pin number and follow transaction instructions/procedures.
- Print receipt and give the customer a copy and keep a copy for the organisation.



Ethical standards and codes of conduct

A code of conduct is a document laid out by an organisation or professional body in which expectations for behaviour, responsibilities and actions of its members are clearly stated.

Business ethics are the moral principles that govern an organisation to ensure corporate responsibility, quality assurance and customer satisfaction. When combined, a code of conduct and business ethics defines the morality of an organisation and sets the standard for the behaviour and work ethic of its members. It should incorporate that all members of the organisation will be given equal opportunities and treated equally and fairly regardless of any differences.

A code of conduct and business ethics policy will normally be a written document that can be easily accessed by all members of the organisation. It should form part of the induction process for all new employees and be used for existing employees for refresher training at regular intervals.

A code of conduct and business ethics policy must be enforced consistently if it is to have any effect or if it is going to be valued by those it governs. If employees that breach the code in any way are not dealt with accordingly, other employees will have no faith in the system and may lead to increased unethical behaviour.

It is particularly important to ensure unethical behaviour is addressed and dealt with appropriately and thoroughly.

You will need to be aware of possible restricted products if you sell them, for example:

- Tobacco & nicotine inhaling products
- Online sales of age-restricted products
- Aerosol spray paints
- Alcohol
- Cigarette lighter refills & solvents
- Crossbows, air weapons etc.
- Fireworks
- Knives & other bladed items



You should also be responsible when selling restricted products such as alcohol, as they are restricted to people who are over certain ages. You will need to ask for identification to prove age if you are in any doubt to the age of a person attempting to buy it.

Activity 3B



3.3 – Farewell customer on leaving, and invite to return

3.4 – Provide any required after sales service according to organisational procedures

Saying farewell

It is important to give a lasting impression, this means saying farewell to the customer. There are many different options here, but the key is to make it personal. The last impression is a lasting impression, so you should make it count. It could be the difference between a customer coming back again to buy goods or not.

You may like to:

- Ask the customer if they found everything they were looking for
- Ask the customer if everything was okay/if they were satisfied with their experience
- Tell the customer you hope to see them again
- Agree with customer choice – ‘I love these, I have two pairs – they’re so comfy’
- Use your organisational name/brand to say goodbye so it sticks in their minds



It is most important to be genuine when you say goodbye and sometimes, if you have been talking to a customer and helping them, you can make it even more genuine by referring to a previous conversation or context.

After sales service

Giving your customers a good after sales service shows you care about them and want to retain their custom. After-sales services can encourage customer loyalty and get people to refer your organisation to others.

After sales service begins with the point of sale where you should:

- Thank customers for coming in/using your service
- Confirm sale and delivery arrangements (if appropriate)
- Ensure you have customer contact details and the customer knows how to contact you if needed
- Add customers to email/ mailing lists
- Suggest complimentary/additional products or services
- Explain refund policies (very relevant if guarantee, warranty and refund policy goes beyond what the law states as a minimum)

- Offer customer free magazine/brochure, samples etc.
- Offer to carry the product to customer's vehicle
- Offer loyalty program, mailing list for invites to special promotions and events
- Notify customers of your participation in social media channels and offer them an invite to join
- Offer gift cards for family and friends
- Offer customer your business card and suggest they call with any issues.

Following up may also involve updating customers e.g. on a delivery or checking their satisfaction through feedback forms. You may need to book in clients manually via a diary system, or use an electronic database. If using a diary system, you may need to pencil the client's details in so that they can be changed if the client is not available for some reason. You may need to send a satisfaction survey via email, or you might need to telephone customers at the appropriate time and ask them for their feedback.

Activity 3C



Summative Assessments

At the end of your Learner Workbook, you will find the Summative Assessments.

This includes:

- Skills assessment
- Knowledge assessment
- Performance assessment.

This holistically assesses your understanding and application of the skills, knowledge and performance requirements for this unit. Once this is completed, you will have finished this unit and be ready to move onto the next one – well done!

References

These suggested references are for further reading and do not necessarily represent the contents of this unit.

Websites

Consumer rights:

<https://www.accc.gov.au/business/treating-customers-fairly/consumers-rights-obligations>

All references accessed on and correct as of 01/07/2016, unless otherwise stated.

SITXCCS003

Interact with customers

Learner Guide



Unit of Competency

Application

This unit describes the performance outcomes, skills and knowledge required to deliver fundamental customer service to both internal and external customers. It requires the ability to greet and serve customers, and respond to a range of basic customer service enquiries, including routine customer problems.

The unit applies to frontline service personnel who operate under close supervision and with guidance from others. They provide routine customer service and would not be expected to respond to complex customer requests or complaints.

The unit applies to individuals working in a range of tourism, travel, hospitality and events contexts.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Unit Sector

Cross-Sector

Performance Criteria

Element	Performance Criteria
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Greet and serve customers	1.1 Prioritise customers ahead of other workplace duties 1.2 Greet customers according to organisational customer service standards 1.3 Communicate with customers in a clear and professional manner 1.4 Explain and match products and services to customer needs
2. Work with others to deliver service	2.1 Identify personal limitations in serving the needs of customers and seek assistance from others where appropriate 2.2 Follow directions of supervisors and managers to deliver quality service 2.3 Resolve routine customer problems according to own level of responsibility and organisational policy 2.4 Escalate other service issues to a higher level staff member for action in line with organisational procedures
3. Provide feedback on customer service	3.1 Report service issues and customer problems as they arise 3.2 Provide customer feedback to relevant supervisors or managers

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Reading

- Interpret sometimes detailed procedures documents

Writing

- Record simple notes and basic information

Oral Communication

- Ask questions and actively listen to customers to determine their needs
- Discuss causes of customer problems with colleagues and supervisors in a professional manner

Problem Solving

- Recognise customer problems and resolve or refer service issues

Initiative and Enterprise

- Recognise delays and deficiencies in customer service and rectify to customer satisfaction in line with own level of responsibility

Range of Conditions

Specifies different work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included.

Range is restricted to essential operating conditions and any other variables essential to the work environment.

Ways to communicate with customers must include:

- Communicating:
 - by telephone
 - electronically
 - face-to-face
- Showing interest in customer needs and maintaining a welcoming customer environment during service delivery through the use of:
 - appropriate voice tonality and volume
 - basic gestures
 - product information sheets.

Others must include:

- Colleagues
- Managers
- Supervisors.

Assessment Requirements

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- Identify customer requirements and provide effective customer service to two different internal and two different external customers to meet requirements
- Interact with above customers in line with organisational customer service standards and within designated organisational response times
- Demonstrate procedures to respond to three different customer problems according to organisational policies and procedures
- Identify situations where problems are beyond own level of responsibility, and process to escalate in line with organisational policies and procedures
- Seek informal feedback from customers on above activities.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- Importance of the customer in the service industries
- Customer service standards expected in the service industries
- Profiles of different types of customers:
 - external
 - internal
 - new
 - regular or repeat
 - visitors
- Value and role of customer feedback in improving service delivery
- Presentation standards for:
 - customer environment
 - customer service personnel
 - documents and promotional materials
- Customer service policies and procedures:
 - application of booking or cancellation fees
 - response times for acknowledging and greeting customers
 - response times for delivering products and services
 - customer service policies for resolving routine customer problems
 - policies regarding product pricing and quality
 - processing refunds and exchanges
 - empowerment of different levels of personnel to resolve complaints, disputes, service issues and customer compensation
 - policies for escalating and reporting service issues and customer problems
- Procedures for responding to routine customer problems:
 - incorrect pricing of products and services
 - delays or errors in providing products or services
 - misunderstanding customer requests.

Assessment Conditions

Skills must be demonstrated in an operational business environment where customers are served. This can be:

- An industry workplace
- A simulated industry environment.

Assessment must ensure access to:

- Organisational policies and procedures relating to:
 - customer service standards
 - designated response times
 - presentation standards
 - dealing with customer problems
 - recording and reporting customer feedback
- Internal and external customers with whom the individual can interact; these can be:
 - customers in an industry workplace during the assessment process; or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Links

Companion Volume Implementation Guide: - <http://www.serviceskills.com.au/resources>

1. Greet and serve customers

- 1.1.** Prioritise customers ahead of other workplace duties
- 1.2.** Greet customers according to organisational customer service standards
- 1.3.** Communicate with customers in a clear and professional manner
- 1.4.** Explain and match products and services to customer needs



1.1 – Prioritise customers ahead of other workplace duties

Introduction

Many industries involve regular interaction with customers, including tourism, travel, hospitality and events. Good customer service skills are essential for success in the job. You will have to learn how to greet and serve customers and respond to a range of basic customer service enquiries, including routine customer problems.

Prioritising customers

Different types of customers you may have to interact include:

- External
- Internal
- New
- Regular or repeat
- Visitors.



Customers are vital to most organisations. Therefore, you should treat them with the appropriate respect and courtesy when they arrive on the premises or contact you via phone. This includes prioritising them above any other tasks you are completing at the moment.

Consider how you would feel as a customer if you ask for assistance from an employee and they said: “I can’t help you right now.” This implies that you aren’t important. You may decide not to make your original purchase or not to return to the business in future.

Ways to show you are prioritising customers include:

- Acknowledging them as soon as they enter your area with a polite greeting or a smile
- Asking if they need any help
- Stopping whatever else you are doing if they speak to you
- Listening attentively to them
- Helping them before resuming any other duties.

One of the most common errors in customer service is continuing to do whatever you are doing when a customer is speaking to you. You may simply be trying to get your work done faster; however, it looks disrespectful and creates a bad impression. Stop whatever you are doing, whether it is typing on a computer or stacking shelves. This shows you are giving them your entire attention.

Sometimes customers may ask you something when you are doing an important task that you can’t leave for some reason. In these situations, you should listen to them and say something along the lines of: “I am very sorry, I’m afraid I can’t help you right now. I can get my colleague to help you if you would like?” If the customer agrees to this, make sure you follow through on your promise.

Communicate to a colleague orally or by telephone and find out if they are free; you may need to explain the customer's request or say "Would you be able to help here please?"

Alternatively, if you are finishing a phone call that can't be interrupted, make eye contact with the customer to show you have acknowledged them. If possible, pause your conversation to say: "I will be with you in one moment." If the phone call seems like it will last a while, it would be polite to say to the person on the other end: "I have a customer here, would I be able to call you back?"

Presentation standards

Before interacting with customers, you should make sure you and the work environment around you meets the presentation standards. For you, this will likely require wearing a clean uniform, having good hygiene and otherwise looking presentable. Your work environment that customers will see should be clean and tidy, with no hazards that could possibly harm or upset them. In addition, if you use any promotional materials, ensure they are new and of good quality. If they are old, creased or torn, it won't present a good image of the company.



Activity 1A



1.2 – Greet customers according to organisational customer service standards

Greeting customers

A greeting will often be the first thing customers encounter in your organisation; you should make sure it gives a good impression.

When customers enter your workplace, you may be required to give them a standard greeting. For example: “Welcome to Sam’s Boutique Shop, how may I help you?” Make sure you memorise this so you don’t stutter or get it wrong. It is important to sound enthusiastic.

Alternatively, a friendly, polite greeting will show your interest to the person. This is known as discretionary phrasing as you have control over the wording.

These could include:

- “Good morning/day, how are you?”
- “Hello, is there anything I can help you with?”
- “Hello, do you have a reservation?”
- “Welcome to [name of business], have you been here before?”
- “Good morning, can I interest you in...”



It is important to smile genuinely with your greeting. If this feels false or unconvincing to start with, practice it a few times and it will soon come naturally.

Eye contact is another important aspect. If you look at the customer as you are addressing them, it will help to create a personal connection and make them feel valued. If you don’t look at them, you may appear distracted, bored or reluctant to help them.

There are two main types of greetings:

- When the customer approaches you at your work station
- When you approach the customer as they are in the area.

You may need to change your greeting depending on which scenario is occurring. For example, if the customer is just browsing, they may not require your help right now. Initiating a conversation with “How are you?” could make them feel awkward as they don’t want to talk at this point, whereas as saying “Is there anything I could help you with?” gives them the choice over whether they need your assistance. Some people may be more comfortable browsing or making decisions on their own before they approach you.

Some organisations may require you to inform the customer of their name when you are greeting them. For example: “Hello, my name is...” This creates a more personal connection and can allow them to ask for further assistance later.

Although a greeting can sound like pleasantries, it can also provide you with information to give the customer better service. For example, they may say whether they are familiar with your organisation or have specific goals in mind. Therefore, pay attention to the customers reply and be ready with a follow-up question if necessary.

Some additional rules for greeting:

- Don't address the customer from behind; this may surprise or startle them and appears rude
- Don't call the greeting to the customer from a long way away; physically approach them to a reasonable distance
- Keep eye contact going through the exchange
- Use a suitable level of formality; in some organisations, it might be appropriate to be friendly and relaxed but not in others.



Activity 1B



1.3 – Communicate with customers in a clear and professional manner

Communicating with customers

Communicating with people is a complex topic, especially when they are customers. Here are some of the techniques and skills you can use to make your communication more professional and effective.

Active listening

It is possible to hear what people are saying without actually listening and understanding their meaning. Sometimes, we will just assume we know what they want and ignore the details or any extra information they have.



To listen properly, you should stop whatever you are doing and focus on the person's words. Don't start thinking about what you are going to say in reply until the person has finished speaking. However, small phrases like "I see" or nods of your head can indicate you are interested in what they are saying and want them to tell you more.

Staying positive

One important aspect of appearing professional is being positive, both to the customer and other people. For example, if a customer asks for a product, don't say "Oh dear, I don't know where that is. I'll have to stop what I'm doing and look for it." This makes the customer feel like a problem. Remain upbeat and say something like: "That's not a problem, I will find that you in just a moment."

Nothing will sound worse to a customer than overhearing you say something negative like "I can't believe Steve is late again." This will make both you and your colleagues sound bad. If you have to complain about something, do it in private where customers can't hear you.

Similarly, everyone has bad days at work, but try not to convey this to your customers. They will pick up on your facial expression, tone of voice and body language, and quickly work out you don't want to be there or to serve them. Whether you're having work-related or personal problems, try to put them out of your mind while serving customers. Sometimes just the act of appearing cheerful can make you feel better.

Tone of voice

As mentioned above, your voice can convey significant information to customers. Therefore, you should keep it at an appropriate tone and volume. "Nice to see you," can have very different meanings if it's said in a cheerful voice and a bored, uninterested one. It is better that you sound too happy than too sad when communicating.

Your volume is also important. In loud service areas like restaurants, it can be difficult to hear. Make sure you project your voice loudly enough so all customers can understand you. If you have trouble with this, speak slower and face the customers, emphasising important parts of the sentence. However, don't make your volume too high; no one likes being shouted at.

To choose the right volume, see how other people around you are speaking and also consider your customer's various needs such as difficulty hearing.

Keeping customers informed

Once you have identified what action needs to be taken (e.g. ringing someone or looking for the customer's desired product), you should tell customers what you will do. If they tell you they need something and you start making a phone call without replying, it may look as though you are ignoring them. To remove any confusion and keep them informed, say something along the lines of: "I am just going ring our Head Office to see if we are accepting that voucher. Please bear with me for one moment."

If you need to take follow-up actions, communicate these clearly. Saying "I'll get back to you when I know" isn't as clear as "I will ring our Sales Manager as soon as she's back in and find out for you. Is this number alright to call you back on?"

Be aware of jargon

In your job role, you may pick up various pieces of technical terminology or 'jargon' that customers won't understand. You should always substitute these with more immediately understandable words and phrases. If the customer doesn't understand what they are saying, you may make them feel stupid.



Activity 1C



1.4 – Explain and match products and services to customer needs

Explaining and matching products/services

Once you have identified the customer's requirements, you may be able to match them to a product or service that will suit their needs.

If the customer does not provide specific information about their needs, you will need to ask questions to collect it.

There are a variety of questions you can use, including:

- **Open questions:** Produce a wide range of answers (e.g. "What are you looking for?")
- **Closed questions:** Produce a short answer, usually yes or no (e.g. "Do you need the product to be waterfront?")
- **Specific questions:** Gather more information (e.g. "Where would you use this product?")
- **Prompts:** Encourage the customer to keep speaking (e.g. "Can you tell me more about that?")

When considering the appropriate product for the customer, don't automatically try to sell them the most one. If this doesn't meet their needs, they won't return to the organisation in future. Consider what product you would most want if you were in their position, and provide them with information about it so they can make an informed decision.

You may need to explain aspects of the products or services such as:

- Price
- Benefits of product
- Specifications
- Availability (e.g. immediately, few days).



To provide further information, you could provide them with written information, catalogues, leaflets, website information or visual demonstrations.

The customer may ask you to suggest something for them if they don't have much experience. Try to be honest and choose an appropriate product or service.

Dietary needs

Customers may have a range of dietary needs that you will need to consider in restaurants. As you have more knowledge, they may ask you to recommend food or drinks that are suitable for them. If you are unsure, you will have to consult somebody else and get back to them. Ignoring people's dietary needs can cause them physical harm and violate their sense of ethics or religion. This would make it very unlikely they return to the organisation.

Dietary needs may include:

- Allergies, in which people's bodies have adverse reactions to certain foods. Common allergies include nuts, fish, eggs and fruits
- Vegetarians, in which the person doesn't eat any products containing meat and sometimes fish for ethical or health reasons
- Vegans, who don't eat any animal products including meat, eggs and milk
- Religious requirements, such as:
 - halal food, which has been prepared in accordance with Muslim dietary regulations
 - Kosher food, which has been prepared in accordance with Jewish dietary regulations
- Other cultural or religious requirements.

Communication needs

Be aware that not everyone communicates in the same way. Some people have disabilities or impediments which require them to use a range of other methods, such as sign language, written communication or PECS (picture exchange communication system) symbols. You should try to accommodate people's various needs as much as possible when explaining information. For example, when communicating with a deaf person, make sure you face them as you speak so they can lip read. In addition, always address the person directly even if they have a carer with them.



Language barriers are also increasingly common in multicultural businesses. Whenever you encounter someone who speaks a different language to you, try to speak clearly and simply. There may be other people in the organisation who can act as an interpreter. Remember to treat people who speak other languages as regular customers; don't abandon, mistreat or patronise them.

Physical abilities

Customers will have a wide range of physical abilities. For example, some people may have difficulty walking, standing for long periods or carrying objects. You may have to make accommodations to help them. For example, in restaurants people with mobility problems should be seated in areas with wheelchair access that don't require the use of stairs.

If you see a person struggling due to their physical abilities, it is polite to offer help. However, do not automatically assume they will want it; respect their decision if they wish to be independent. In some circumstances, you may need to call others to assist with physical tasks.

Activity 1D



2. Work with others to deliver service

- 2.1.** Identify personal limitations in serving the needs of customers and seek assistance from others where appropriate
- 2.2.** Follow directions of supervisors and managers to deliver quality service
- 2.3.** Resolve routine customer problems according to own level of responsibility and organisational policy
- 2.4.** Escalate other service issues to a higher level staff member for action in line with organisational procedures



2.1 – Identify personal limitations in serving the needs of customers and seek assistance from others where appropriate

Personal limitations

Everybody has personal limitations which will affect their ability to interact with customers. These are anything that prevent you from achieving successful outcomes. You will need to identify and address these in order to keep customers satisfied.

Recognising personal limitations isn't a weakness but a sign of maturity. In some cases, you may need to pursue further training to prevent the limitations from becoming an issue in the future.

Personal limitations may include:

- Lack of time
- Lack of resources
- Lack of skills
- Lack of authority.

Sometimes there simply isn't enough time to complete all the tasks you need to, even if they involve interacting with customers. This is particularly common in hospitality organisations like restaurants, where customers expect to be served promptly. In some cases, the best approach may be to apologise for the delay: "I'm sorry, I'm afraid your food will just be five more minutes. Thank you for your patience." However, when a delay is not acceptable, you may lose business or annoy customers. In these cases, you will need to seek additional help.



Most organisations are structured hierarchically, with the people at the top having more responsibility and authority. Therefore, you won't be able to complete all important tasks. When something arises that needs a manager or supervisor's approval, you will need to explain the issue to the customer and contact the manager as soon as possible.

Seeking assistance

It is important to ask for help when you need it. Although this may inconvenience the customer by causing a short delay, they will be far more annoyed if you fail to meet their needs or complete a task improperly.

Therefore, you should be open and honest when seeking assistance. Explain the reason, such as a sudden rush of customers or the person's specific skills. If that person isn't available to lend assistance, keep trying until you find someone who is.

People you can ask for assistance may include:

- Managers or supervisors
- Colleagues
- Employees from other departments, areas or branches
- Employees with specialist skills.

Activity 2A



2.2 – Follow directions of supervisors and managers to deliver quality service

Following directions

Following directions is an important aspect of providing service to customers.

You should use your active listening skills to pay attention to exactly what the manager wants you to do; don't make assumptions and risk doing it incorrectly. It is also important not to think "I've got a better idea" and complete the service your own way; the manager may know something you don't which is why they gave you the direction.

If for some reason you can't follow a direction (e.g. lack of experience, skills or knowledge), you should explain this to your manager. Some tasks may require training before you can complete them. You could ask: "I'm not sure how to do that, could you show me?" There may be other reason you can't follow a direction. Inform your manager of this as soon as possible, and ask for alternative options.



Carrying out instructions

When you receive a direction, you can begin planning how to complete it. Does the task have multiple parts? If so, do they have a set order or priority (order of urgency) that they need to be completed in? Do you have all the necessary resources to do so?

For example, imagine you work at a restaurant and your manager asks you to clean a table and then see to the customers who have just walked in.

From this, you can construct an order of tasks to complete:

1. Clean a table and remove any previous dishes from it
2. Greet the customers
3. Ask if they have a reservation
4. Seat them at the table
5. Take their initial order.

Other optional tasks might include gathering cleaning supplies or telling the customers you won't be long. You may need to use your own judgement and initiative to determine the best order and how high of a priority they are.

Problems may also occur that you will have to solve. For example, there are too many customers to fit around the single table. In this case, you may need to ask other employers to help put tables together or consult whether customers about their particular needs.

Asking for clarification

If you don't fully understand the instructions, you should ask for more information from the manager. This may include clearing up misconceptions, gathering more details or considering alternative options.

Phrases that you could use include:

- "What do you mean when you say...?"
- "How exactly would you like me to do that?"
- "Could you explain that in more detail please?"
- "What would you like me to do if that isn't possible?"



Activity 2B



2.3 – Resolve routine customer problems according to own level of responsibility and organisational policy

Resolving customer problems

Customers will likely come to you with various problems that you will have to attempt to resolve. Even if they are not your fault, you should take responsibility for solving them. You will need to consider your responsibility (meaning what your job description states you should do) and organisational policies regarding these situations.

Routine customer problems may include:

- Incorrect pricing of products and services
- Delays in providing products or services
- Misunderstanding of customer requests
- Providing incorrect products or services
- Requests for refunds or exchanges.



Signs that customers may have a problem include:

- Customers trying to attract your attention or approaching you
- Customers ringing your customer service/complaints number
- Overhearing customers discussing problems which they don't want to bring to your attention.

As mentioned in Chapter 2.1, you may not have the authority to resolve all problems. For example, in some small organisations, refunds might need to be discussed with the manager. In this case, you will need to explain the situation to the customer and summon the manager as soon as possible. The organisation may also have a variety of policies which will affect your ability to resolve problems. Once again, you will need to apologise, explain the reason and fetch another member of staff if necessary.

Recognising problems

It is important to acknowledge the problem when the customer brings it to your attention. Denying it or making excuses will probably annoy the customer even more. Instead, listen to what they say and recognise that their problems and opinions are valid, even if you don't agree with them. Ask for more details to gather information if necessary. For example, if you aren't sure how to resolve it, you could ask: "What would you like to happen?" It is also advisable to thank them for bringing the problem to your attention, as this is an opportunity to prevent it from happening again.

Once you have decided on a course of action, inform the customer of it and ensure that it is acceptable to them. For example, if they have a poor meal and your response is: "We will make sure that doesn't happen next time", they may still be unsatisfied and unlikely to return. However, if you deal with the complaint well and offer them compensation, they may consider becoming a repeat customer.

Resolving problems

Try to deal with problems as soon as possible. If you take a long time, the customer may worry you have forgotten or are intentionally avoiding it. If there are problems, explain it to the customer as soon as possible. For example: “I am sorry this is taking a while, I am having problems contacting the manager. Thank you for your patience.”

As mentioned earlier, sometimes you can attempt to apologise to the customer through:

- Discounts from purchases or a bill
- Free vouchers
- Other gifts
- Letters from the manager.



You may need to inform a higher authority such as your manager, supervisor or the owner of any customer complaints. Make sure to do this in a timely manner and be honest about the complaint. This will help you to avoid future problems with customers.

After the complaint is resolved, you may need to fill in documentation recording what the complaint was and how it was resolved.

Organisational policy

These are the rules on how you should respond the certain situations. Be aware that they aren't guidelines; in most cases they are strict rules that could result in disciplinary procedures if you don't follow them correctly. They are there to protect the organisation's reputation and finances.

You should be aware of your organisation's policies on:

- Cancellation fees
- Empowerment of different levels of personnel to resolve customer problems
- Exchanges
- Pricing
- Product quality
- Refunds
- Response times for delivering products and services.

All of these policies can affect the way you carry out your duties and the level of autonomy you have. If you aren't aware of them, ask your supervisor or read an organisation handbook you may have been provided with.

An example of a cancellation fee policy:

'All notifications of cancellations must be received in writing at least seven days before the event. If the notice is received more than two weeks beforehand, a 50% refund will be given. If it is received afterwards or none is received, no refund will be given. The organisation also reserves the right to cancel the event if there are insufficient numbers, in which case a full refund will be given.'

You will need to follow policies as closely as possible. Pay attention to small print and the required action in different circumstances. Remember to read the whole of the relevant policy before taking action as it may not be immediately obvious what the correct courses of action is.



Activity 2C



2.4 – Escalate other service issues to a higher level staff member for action in line with organisational procedures

Escalating service issues

If you aren't able or aren't allowed to resolve an issue on your own, you will need to escalate it to a higher member of staff. Remember, this isn't an admission of failure on your part.

You may need to refer it to:

- A manager
- A co-worker with more experience
- A co-worker with specific skills with the issue.

You should refer the issue as quickly as possible, as customer problems are usually time-sensitive. You will need to provide all details that the customer gave to you in order to help resolve it.

If the customer is waiting on the premises for you to escalate the issue, you should be seen to do so and explain what is happening. This could be making a phone-call, sending an email or submitting the issue on an online complaints form.

An example of escalating an issue to a manager:

"Good morning, I have a customer here who is asking for a refund. I have explained that only you are able to authorise it; would you be able to speak to them and make a decision? Unfortunately I'm not qualified to do it."

You could escalate issues by:

- Speaking to the employee in person
- Ringing them on the phone
- Emailing them if they aren't present at the organisation.

Other employees including managers will often be busy; therefore, you will have to explain politely what the issue is when you interrupt them. Mention if the customer is waiting as this will make it a higher priority for them.



Activity 2D



3. Provide feedback on customer service

- 3.1. Report service issues and customer problems as they arise
- 3.2. Provide customer feedback to relevant supervisors or managers



3.1 – Report service issues and customer problems as they arise

Reporting issues and problems

During customer service, it is possible that various problems and issues will arise. These could prevent you from completing your duties properly. When they do, you will need to report them to relevant people in your organisation who can resolve them.

You may need to report issues to:

- Managers or supervisors
- Customer complaints department
- Colleagues.

Issues may relate to problems with the customer's experience in your organisation or the products/services themselves.

Keep customer informed at all times. If there is a delay with reporting issues for some reason, the customer may believe they have been forgotten; keep communicating to them what is happening. For example: "The manager will be here in five minutes to sort your issue out." Make sure that your time frame is realistic; if you promise them that their problem will be resolved sooner than it is, they may become frustrated.



You may need to report:

- Exactly what the issue is, including details of how it is affecting service or customers
- The cause of the issues (if it is known)
- Which customers it has affected
- How it could best be resolved.

Try to be proactive in identifying issues. If it looks like customers may be unhappy or dissatisfied, you should approach them and ask if everything is alright.

You should also check that everything was satisfactory at the end of their visit to the organisation. When they have made their purchase or are about to leave, you could ask them: "Was everything alright for you today?" or "Did you have any problems?" You can then report these identified problems to the appropriate employee.

Angry customers

If customers become angry due to the problems or issues, you may also need to refer them to your manager/supervisor. When faced with problems, some customers can become abusive or threatening. Your manager will likely be more experienced in handling and defusing situations like this. Try to reassure them that their situation is being dealt with properly.

Activity 3A



3.2 – Provide customer feedback to relevant supervisors or managers

Providing feedback

When customers provide you with feedback, you will need to pass it on to the relevant supervisors or managers. This could be either positive or negative. They both have uses; positive feedback identifies elements of the service the customers like or appreciate, while negative feedback gives information on elements that need to be changed to improve customer experience. It is important that all feedback is processed, which will require you to pass it on.

Feedback could be provided through:

- Complaints procedures
- Phone calls
- One-on-one meetings with managers
- Team meetings.



It is a good team-building exercise for members of an organisation to sit down together occasionally and discuss recent feedback they have received. This prevents feedback from being taken out of context. For example, if five customers have provided positive feedback about an aspect of service and one has provided negative, it should generally be seen as performing well. Problems can be analysed in team meetings and solutions suggested. These could be conducted every week or so.

When providing feedback, try to keep it as accurate as possible so you retain the customer's meaning. For example, if they complained about a specific dish at a restaurant, simplifying the feedback to: "They didn't like the food" loses the meaning and prevents the management from making any meaningful improvements.

You will need to report:

- Exactly what the customer said
- The situation in which they provided the feedback
- The cause for it
- Potential solutions.

Example of passing on positive and negative feedback:

"My customer reported that the area of the restaurant where they sat was very cold. Apparently the air conditioning was on full and the employee that they spoke to didn't know how to turn it down. It might be a good idea to identify where the switch for it is and inform all employees. We could also try to adjust it more often."

"A customer yesterday was very happy with the service. There was a problem with their food, but because we communicated well with them, we were able to fix the issue quickly. They were particularly pleased how often people came to check on them."

Activity 3B



Summative Assessments

At the end of your Learner Workbook, you will find the Summative Assessments.

This includes:

- Skills assessment
- Knowledge assessment
- Performance assessment.

This holistically assesses your understanding and application of the skills, knowledge and performance requirements for this unit. Once this is completed, you will have finished this unit and be ready to move onto the next one – well done!

SITXCOM002

Show social and cultural sensitivity

Learner Guide



Unit of Competency

Application

This unit describes the performance outcomes, skills and knowledge required to be socially aware when serving customers and working with colleagues. It requires the ability to communicate with people from a range of social and cultural groups with respect and sensitivity, and to address cross-cultural misunderstandings should they arise.

The unit applies to all tourism, travel, hospitality and event sectors. All personnel at all levels use this skill in the workplace during the course of their daily activities.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Unit Sector

Cross-Sector

Performance Criteria

Element

Elements describe the essential outcomes.

Performance Criteria

Performance criteria describe the performance needed to demonstrate achievement of the element.

- | | |
|---|---|
| <p>4. Communicate with customers and colleagues from diverse backgrounds</p> | <p>1.1 Respect customers and colleagues from different social and cultural groups and treat them with respect and sensitivity</p> <p>1.2 Consider social and cultural differences in all verbal and non-verbal communication</p> <p>1.3 Respond to others in a non-discriminatory way</p> <p>1.4 Make attempts to overcome language barriers</p> <p>1.5 Seek help with communication when necessary</p> |
| <p>5. Address cross-cultural misunderstandings</p> | <p>2.1 Identify social and cultural issues that may cause conflict or misunderstanding in the workplace</p> <p>2.2 Address difficulties and seek assistance from others when necessary</p> <p>2.3 Consider social and cultural differences when difficulties or misunderstandings occur</p> <p>2.4 Make efforts to resolve misunderstandings, taking account of social and cultural considerations</p> <p>2.5 Escalate problems and unresolved issues to appropriate supervisor or manager for follow-up</p> |

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

- Reading skills to:
 - understand workplace anti-discrimination policies and plain English documents produced by government information agencies
- Oral communication skills to:
 - discuss cross-cultural misunderstandings and difficulties with supervisors, managers and other team members and identify possible strategies to resolve them.

Assessment Requirements

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- Communicate in a non-discriminatory way with colleagues and customers from at least three different social and cultural groups:
 - demonstrating attempts to overcome language barriers
 - communicating in line with appropriate social and cultural conventions
 - demonstrating respect and sensitivity
- Identify when assistance is required in the above communication, and seek help using the appropriate channels.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- Key principles of fairness and equity in relation to interaction with colleagues and customers
- Key cultural and religious protocols of main social and cultural groups in Australian society, including Australian Indigenous people
- Key cultural and religious protocols of main inbound tourist markets to Australia
- Different types of disability and their implications for the workplace
- Anti-discrimination policies for the industry and specific organisation
- Basic aspects of state, territory and commonwealth laws covering anti-discrimination, including requirements to:
 - treat customers and colleagues fairly and equitably
 - not discriminate, show partiality or grant any special favours on the basis of social and cultural attributes
 - not threaten, humiliate or intimidate people because of their social or cultural attributes
- Sources of assistance in communicating with colleagues and customers from diverse social and cultural groups:
 - government agencies
 - diplomatic services
 - disability advocacy groups
 - educational institutions
 - interpreter services
 - local cultural organisations
- Approaches to overcoming language barriers in the workplace:
 - communicating through the use of:
 - gestures
 - signs
 - simple words in English or the other person's language
 - giving simple directions
 - giving simple instructions.

Assessment Conditions

Skills must be demonstrated in an operational tourism, travel, hospitality or events environment where communication with socially diverse customers and colleagues takes place. This can be:

- An industry workplace
- A simulated industry environment.

Assessment must ensure access to:

- Current organisational anti-discrimination policies
- Plain English documents issued by government regulators that provide information on anti-discrimination laws
- Customers and other colleagues from a diverse range of social and cultural groups with whom the individual can interact; these can be:
 - customers and colleagues in an industry workplace who are assisted by the individual during the assessment process; or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume Implementation Guide: - <http://www.serviceskills.com.au/resources>

1. Communicate with customers and colleagues from diverse backgrounds

- 1.1. Respect customers and colleagues from different social and cultural groups and treat them with respect and sensitivity
- 1.2. Consider social and cultural differences in all verbal and non-verbal communication
- 1.3. Respond to others in a non-discriminatory way
- 1.4. Make attempts to overcome language barriers
- 1.5. Seek help with communication when necessary



1.1 – Respect customers and colleagues from different social and cultural groups and treat them with respect and sensitivity

Respecting people from different social and cultural groups

It is important – not just in business, but also in life – to acknowledge that everyone has different ideas, beliefs and values and that people live, interact and make decisions based on these ideas. For some, politics and religion play the most important roles in the formation of their identities; for others, it can be anything from heritage and upbringing to music and literature – there is no end to the factors that influence a person's sense of right and wrong.

For these reasons, it is vital – when working for or running a business – to respect customers and colleagues, regardless of their social and cultural identity.

Treating people with respect and sensitivity

The ability to acknowledge, learn from and relate to people from all cultures and backgrounds is known as 'cultural responsiveness'.

Being culturally responsive is not about trying to influence others to be more like you or the society you come from. Rather, it is about exploring and accepting the differences between yourself and others and treating everyone fairly, with respect and sensitivity.

This means:

- Developing cultural self-awareness
- Learning to appreciate the value diverse views
- Resisting stereotyping
- Learning what you can
- Accepting the limitations of your naivety.



Developing cultural self-awareness

Think about what has influenced your own cultural identity; what values and beliefs do you hold and why? Developing an awareness of your own cultural and social makeup is the first step towards understanding that others hold different values and beliefs and believe in them as much as you believe in yours.

Learning to appreciate the value diverse views

You should try to avoid judging the beliefs and attitudes that differ from your own as the polarisation of people is ultimately counter-productive. Instead, just accept that they are different and try to understand the reasons why they believe what they believe.

Resisting stereotyping

Stereotypes, whether negative or positive, always stand in the way of mutual understanding between people from different cultures and backgrounds. Statements such as 'blondes are stupid' or 'Asians are good at maths' will never be true of all individuals within that population.

Learning what you can

The most effective way to learn more about others and develop cultural responsiveness is to read about other cultures, ask questions and talk with members of different cultures.

Accepting the limitations of your knowledge

To develop cultural responsiveness, you may also need to forgive your own mistakes and ignorance and accept the limits of your cultural knowledge. Don't dwell on these mistakes; remember that everyone has blind spots. Just ensure you take the time to address them.

Anti-discrimination laws in Australia

Respecting others from different social and cultural backgrounds and treating them with sensitivity is not just the right thing to do; in Australia, it is the law. Your organisation will also have its own anti-discrimination policies that you must abide by.

Australian anti-discrimination legislation operating at a federal level includes:

- The Age Discrimination Act 2004
- The Australian Human Rights Commission Act 1986
- The Disability Discrimination Act 1992
- The Racial Discrimination Act 1975
- The Sex Discrimination Act 1984.

Australian anti-discrimination legislation operating at a state and territory level includes:

- Australian Capital Territory – Discrimination Act 1991
- New South Wales – Anti-Discrimination Act 1977
- Northern Territory – Anti-Discrimination Act 1996
- Queensland – Anti-Discrimination Act 1991
- South Australia – Equal Opportunity Act 1984
- Tasmania – Anti-Discrimination Act 1998
- Victoria – Equal Opportunity Act 2010
- Western Australia – Equal Opportunity Act 1984.

**Basic aspects of state, territory and commonwealth laws covering anti-discrimination include the requirement to:**

- Treat customers and colleagues 'fairly and equitably'
- Not discriminate, show partiality or grant any special favours on the basis of social and cultural attributes

- Not threaten, humiliate or intimidate people because of their social or cultural attributes.

Activity 1A



1.2 – Consider social and cultural differences in all verbal and non-verbal communication

Considering social and cultural differences

Verbal and non-verbal communication is the bedrock of a harmonious and productive multi-cultural team, so it is important to devote a certain amount of time to ensuring these skills are up-to-scratch

There are several ways to ensure you are using the correct verbal and non-verbal communication skills.

These include:

- Using appropriate language when working
- Developing cultural awareness and sensitivity
- Using appropriate body language
- Practising non-judgmental communication techniques.

Using appropriate language when working

It is always important to mind your language when working with colleagues and clients of different social and cultural backgrounds. As a product of their issues and symptoms, some of your clients will be of a sensitive disposition. It is part of your job to put them at ease.

Being mindful of language involves:

- Using a level of formality appropriate to your audience
- Refraining from using curse words
- Being clear and avoiding slang
- Avoiding biased, sexual or derogatory comments
- Not patronising or condescending your audience.



Developing cultural awareness and sensitivity

You may have to adapt your communication techniques based on the cultural background of the people involved in a case. If you are unsure, you should look to research a particular culture and its values.

For example, Aboriginal families may react differently to certain care and support plans than other groups. You should always ask for assistance or advice to avoid making mistakes or causing embarrassment or offence if you are unsure in any situation.

Using appropriate body language

Studies have shown that over 90% of all communication is non-verbal, and you should look to be as effective as possible in this area. You should know how to express compassion, attention and understanding through all your actions and behaviours.

You should be aware of:

- The client's personal space
- Your level of animation and enthusiasm
- How to make appropriate gestures
- Yours and the client's facial expressions
- Making eye contact.

**Practising non-judgemental communication techniques**

You should always aim to communicate with individuals without prejudice, favouritism or any pre-conceived ideas about any of the parties involved in a situation.

You should be constantly aware of your interactions with people from different religions, genders, ethnic backgrounds, cultures, and sexual orientations. You should look to develop your self-awareness skills to identify and highlight any occasions where you treat people differently because of individual differences.

Activity 1B



1.3 – Respond to others in a non-discriminatory way

Non-discriminatory practice

Broadly speaking, non-discriminatory practice means treating – and protecting – everyone as equals, regardless of factors such as age, gender, ethnicity, religion, sexual preference, family background, values and/or beliefs.

Every organisation has its own non-discriminatory practices and policies; you should take the time to find and examine these policies and ensure your knowledge is up-to-date.

One of the most effective non-discriminatory practices is the use of non-discriminatory language.

Using non-discriminatory language

Using ‘non-discriminatory language’ means using inclusive language to address and describe all people, regardless of sex, race, ethnicity and physical or intellectual characteristics.

Use acceptable, inclusive language for:

- Gender
- Sexual orientation
- Indigenous peoples
- Common inbound tourist markets to Australia
- Physical and/or intellectual disability
- Race and ethnicity
- Religion.



Gender

You should seek to use gender-neutral, non-sexist and non-gender specific language that includes women and treats men and women equally. Avoid using terms that may be patronising and/or demeaning (e.g. ‘darling’ and ‘love’)

Sexual orientation

It should go without saying that to identify a person on the grounds of their sexuality is discriminatory. You should avoid using any term that could be reasonably interpreted as offensive, insulting or derogatory.

Indigenous peoples

When speaking to or writing about indigenous Aboriginal Australians/Torres Strait Islanders, be sure to use the correct terms and always use a capital ‘A’ for Aboriginals and capital letters for individuals who belong to ethnic groups such as the Koorie, Goorie and Yolngu. Never use negative, discriminatory or stereotypical terms that could be reasonably interpreted as offensive.

Common inbound tourist markets to Australia

As well as thousands of backpackers from Europe, New Zealand and – to a lesser extent – North America, many visiting tourists in Australia hail from Asia countries such as China, Singapore, Japan, Malaysia, South Korea and Hong Kong.

It is vital to mind your customs when dealing with colleagues and customers from these cultures.

The Chinese, for instance, enjoy making small talk and pleasantries before getting down to business; it is also wise not to try and sell a green hat to a Chinese person, as wearing a green hat in China means that someone's wife is being unfaithful!

Physical and/or intellectual disability

Avoid unnecessary reference to the physical and/or intellectual ability of a person or a group and use terms that recognise that a disability is only one characteristic of the person or group. There are many different types of disabilities, which are not always visible to others but could affect how the person works with others and communicates. It is important to be respectful around this subject and treat everyone equally regardless of whether they have a disability.

Different types of disability are:

- Intellectual – could mean difficulty communicating, learning and retaining information. For example, Down syndrome, Fragile X syndrome, Prader-Willi syndrome, and developmental delays
- Physical – could affect, either temporarily or permanently, a person's physical capacity and/or mobility. For example, MS, cerebral palsy, spina bifida, brain or spinal cord injury, epilepsy, and muscular dystrophy
- Sensory – affect one or more senses such as sight, hearing, smell, touch, taste or spatial awareness. For example, autism, blindness, and hearing loss
- Mental illnesses – affects a person's thinking, emotional state and behaviours. For example, bipolar, depression, schizophrenia, and eating disorders.

Modified from source: House with No Steps, Types of disabilities: <http://www.hwns.com.au/Resource-centre/Types-of-disabilities>. Accessed on 08/03/2017.

Race and ethnicity

You should always use the term 'Australian' to describe groups of people who live permanently in Australia. If it is important to specify the descent or ethnicity of a person or group or to distinguish between people born in Australia and elsewhere, then use a qualifier in conjunction with the noun 'Australian' or use hyphenated forms.

For example, Vietnamese-born Australians.

Religion

As a rule, it is better to avoid talking about religion altogether in the workplace, unless you are sure you can have a relaxed,



civilised debate with your colleagues and/or clients. If a religious discussion does take place, be sure to use the correct terminology for what you want to say.

For instance, 'Islamists' does not mean the same thing as 'Muslims'. Likewise, there is a wide variety of religious organisations under the umbrella of Christianity.

Other non-discriminatory practices

Other non-discriminatory practices include:

- Speaking to and being friendly with everyone, regardless of personal characteristics
- Not excluding people from meetings and work-related conversations on personal grounds
- Inviting everyone to participate in social events, from lunch breaks to work nights out
- Making provisions for members of staff with problems such as food and drink allergies
- Making arrangements for physically or intellectually disabled members of staff.

Activity 1C



1.4 – Make attempts to overcome language barriers

Overcoming language barriers

As in life, language barriers are a common challenge in business but what many native speakers often don't realise is that frequently it is not the other person's accent but their own way of speaking that creates the greatest barriers to effective communication.

However, there are strategies you can use to overcome language barriers.

These strategies include:

- Speaking slowly and clearly and using simple English
- Frequently checking for understanding
- Avoiding idioms
- Using gestures and signs
- Giving simple directions and instructions
- Avoiding the use of jargon
- Being specific
- Being patient
- Showing emotion
- Maintaining your sense of humour.



Speaking slowly and clearly

Always try to speak slowly and clearly when communicating with people whose first language is not English. Focus on clearly enunciating your words and slowing down your speech. Even if you're pressured for time, don't rush through your communication. Doing so often takes more time, as miscommunication and misunderstanding can result and you'll ultimately have to invest additional time in clearing up the confusion.

Frequently checking for understanding

Checking for understanding means checking both that you've understood what's been said and that others have fully understood you. Practice reflective listening to check your own understanding (e.g. 'so what I hear you saying is...') and use open-ended questions to check other people's understanding. Asking questions such as, 'Is that clear?' can be effective.

Avoiding idioms

Business language is often contextual, and therefore culturally-specific.

For example, in the US, baseball terms are used extensively: 'Straight off the Bat,' 'Ballpark figures,' 'out in left field,' 'Touch base,' 'Strike a deal'.

As a general rule, if the phrase requires knowledge of other information— be it a game or metaphor— recognise that this may make you more difficult to understand.

Using gestures and signs

Occasionally, gestures can be used to try and convey something, but be sure to avoid using a gesture which may reasonably be considered offensive.

Giving simple directions and instructions

Try to keep things as simple as possible for the person with whom you're corresponding. This will increase your chance of conveying the information accurately and efficiently. Try using simple words in English or the other person's language to help them.

Avoiding the use of jargon

You should try not to use TLAs (Three Letter Abbreviations) and other organisational language that may not be understood by others. If you use them, be sure to provide a description of what these are so others can learn to use the same language you do.

Being specific

Spell out your expectations and deadlines clearly. Instead of, 'Please get back to me shortly,' say 'Please email the completed report by 5pm on Friday.'

Being patient

Cross-cultural communication takes time. You cannot expect your communication to occur with the same speed and ease as when you are communicating with someone from your own culture.

Showing emotion

Most emotions, such as excitement, joy, fear, frustration, and anger, are universal. Just remember that some cultures are more or less restrained in their expressions, so stay within your contact's comfort zone and follow their lead.

Maintaining your sense of humour

Overcoming language barriers can be frustrating for you, as well as for your customer. A smile can help break the tension and make communicating easier.



Activity 1D



1.5 – Seek help with communication when necessary

Seeking help with communication when necessary

Sometimes, you will encounter situations which cannot be improved or resolved without assistance. Part of your job involves using your intuition, knowledge and experience to determine when to ask for help, and also knowing who to contact.

There are several options available to you when it comes to seeking help with communication problems.

These include:

- Asking those around you for assistance
 - e.g. colleagues and customers
- Finding a professional translator
- Using an internet translator/app.

Asking those around you for assistance

If others are around who speak a customer/colleague's language, do not hesitate to ask for their assistance. People who are bilingual are often more than willing to lend their help and practice their skills, regardless of the situation you are in.

Finding a professional translator

Prior to situations where you know there may be substantial issues with communication (such as a business meeting with a foreign party), you may wish to hire a professional translator. These are available from many sources throughout Australia.

Using an internet translator/app

Sometimes, all you may need to do is use an internet translator/app to iron out kinks in communication. You can often find free translators, via search engines, and you can also pay for higher quality translator apps.



If communication problems recur, you might want to consider:

- Reporting the matter to a superior
- Encouraging the recruitment of bilingual colleagues
- Attending language classes
- Brushing up on common phrases in a number of different languages.

Activity 1E



2. Address cross-cultural misunderstandings

- 2.1.** Identify social and cultural issues that may cause conflict or misunderstanding in the workplace
- 2.2.** Address difficulties and seek assistance from others when necessary
- 2.3.** Consider social and cultural differences when difficulties or misunderstandings occur
- 2.4.** Make efforts to resolve misunderstandings, taking account of social and cultural considerations
- 2.5.** Escalate problems and unresolved issues to appropriate supervisor or manager for follow-up



2.1 – Identify social and cultural issues that may cause conflict or misunderstanding in the workplace

Identifying social and cultural issues that may cause conflict

The majority of 21st Century Australian workplaces consist of individuals from a variety of cultural backgrounds, so it follows that there are always likely to be cultural issues that may cause conflict or misunderstanding in the modern workplace.

It is important to identify social and cultural issues that may cause conflict or misunderstanding. Over time – if left unresolved – these conflicts and misunderstandings can seriously undermine team cohesion, performance and, ultimately, profits.

Identifying issues means making sure you and your colleagues have a strong mutual understanding; an idea of each other's backgrounds, values and beliefs.

It helps to be aware of some of the potential issues that could lead to conflict in the workplace.

Cultural issues that could cause conflict or misunderstanding include:

- Dress
 - some individuals will wear specific items of clothing related to their culture (e.g. head scarves or turbans)
- Religious practices
 - for instance, some religions require time during work each day for prayer or time off for religious days
- Customs
 - in some cultures, the consumption of specific foods and drinks is forbidden; or there may be rules about how food should be prepared
- Social values
 - attitudes towards social and sexual behaviour, work ethics, wealth and personal growth can all differ between cultures
- Non-verbal behaviour
 - eye contact, facial expressions, hand gestures and how people interpret them can vary between cultures
- Loaded, culturally-sensitive words and phrases
 - as described in 1.3, individuals should try to avoid using certain words that could reasonably be considered insulting or derogatory.



Employers are responsible for their workers' physical and psychological health and well-being and should encourage tolerance and respect for cultural differences in the workplace.

There will also be issues relating to an individual's:

- Generation
- Education
- Personal background.

Generational issues

There are cultural differences attributable to an individual's generation. A diverse workplace includes employees considered traditionalists, baby boomers, Generation X, Generation Y and Millennials; and each generation has distinct characteristics.

For example, employees considered baby boomers tend to link their personal identity to their profession or the kind of work they do whereas Millennials, broadly speaking, tend to identify themselves according to their cultural preferences and political beliefs.

Education

Differences exist between employees who equate academic credentials with success and employees whose vocational and on-the-job training enabled their career progression. The cultural differences between these two groups may be a source of conflict in some workplaces.

For instance, an employee who believes that a college degree prepared him for managing the processes and techniques of employees in the skilled trades may not be as effective as he thinks when compared to employees with years of practical knowledge and experience.

Personal background

Everyone has a unique experience of growing up. Some people grow up in busy cities, exposed to a greater variety of cultures, opinions and lifestyles, while others grow up in smaller, more rural towns where there is perhaps less diversity. Some people grow up relatively comfortable whereas others may have grappled with issues such as domestic upheaval, drug addiction and mental health disorders.



Activity 2A



2.2 – Address difficulties and seek assistance from others when necessary

Addressing difficulties and seeking assistance

When a social or cultural issue leads to conflict or misunderstanding in the workplace, you need to address the situation as soon as possible.

There are several ways of addressing such difficulties.

Listen

Listening is widely acknowledged as a key conflict prevention and resolution skill. Care should be taken not to impose an approach to listening that causes discomfort. You should also remember that not all cultures are comfortable expressing feelings in public.

Used in a team environment, effective listening can enable individuals to achieve a greater mutual understanding and level of maturity.

Consider the Platinum Rule

The Platinum Rule is to treat others as they would like to be treated rather than the way we like to be treated (the golden rule). It is similar to the difference between sympathy and empathy. Empathy is not about "walking a mile in his/her shoes" but imagining "how he/she feels walking in his/her shoes." Problems with the platinum rule arise when your way and the others way clash.

Remember that different interactions require different responses

The relationship/s between the people involved in any given conflict will help to determine how the conflict should be resolved.

For example, the different levels of power held by different staff members and between staff and clients will influence the resolution strategy. If the person in power is the one whose behaviour has created the conflict, it will be harder for the other person to stand up for themselves, which means that extra care should be taken to ensure both parties are satisfied with whatever course of action is taken.

Guidelines for resolving conflicts

Regardless of the specifics of the conflict itself, there are a number of guidelines to bear in mind when it comes to addressing the situation.

You should:

- Never assume that all disputes that involve people of different cultures necessarily have a cultural component
- Provide a thorough explanation of the dispute resolution process; never simply assume that what you are saying is being understood
- Provide for, or allow for, the use of interpreters
- Respect the other person's point of view



- Ask for frequent expansion on points that you are unfamiliar with, especially if they relate to cultural issues
- Investigate the cultural norms of the people that are involved in the dispute; this is also useful for checking the validity of cultural claims
- Recognise and investigate the cultural differences at play in the use of body language, emotions and problem solving
- Educate those from other cultures on the values and norms of our society
- Be patient, flexible and diplomatic at all times.

Seeking advice and assistance

Some conflicts are so entrenched that they cannot be solved by the participants alone; outside help is needed in the form of conflict mediation.

Mediation involves finding a third party trusted by the people involved in the conflict and then trusting that third party to help find a solution.

To determine whether or not you need help:

- Ask, 'Is help needed?'
- If the answer is 'Yes', act as soon as possible
- Decide what kind of help you want
 - do you need someone to work with you to help you find a solution or do you want to outsource the entire conflict resolution process to a third party?
- Make contact with the appropriate parties.

The mediator/assistance could be in the form of:

- A manager, supervisor or co-worker
- A business coach
- Organisations that specialise in cross-cultural practice
- Ethno-specific services for advice or cultural consultation
- Government agencies
- Diplomatic services
- Disability advocacy groups
- Educational institutions
- Interpreter services
- Local cultural organisations.



Activity 2B



2.3 – Consider social and cultural differences when difficulties or misunderstandings occur

Taking social and cultural differences into account when difficulties arise

When difficulties, conflicts and misunderstandings arise in the workplace, it is vital to consider any and all social and cultural differences which may have caused the situation. Doing so will potentially enable you to tackle a number of latent issues which could harm your organisation further down the line. Whether you are on the lowest rung of the employment ladder, or whether you're the owner/director of the organisation, you should always seek to consider social and cultural differences before wading into the conflict.

You should consider the individuals':

- Age
- Race/ethnicity
- Gender
- Sexual orientation
- Religious beliefs
- Personal background
- Education
- Experience.



At all times, you should be mindful of:

- The language you use
- What you say – e.g. think twice before telling jokes that could hurt or insult colleagues; not everyone shares the same sense of humour
- Trivialising issues or blowing them out of proportion
- Body language, including eye contact and hand gestures.

Avoid imposing your values on others

It is important that you refrain from imposing your own personal set of values and beliefs on the people and clients/customers you work with, as this can lead to alienation and conflict. Your colleagues and clients/customers will have their own values and beliefs and only they should decide how to go about their work and life.

Keep political, religious and spiritual beliefs to yourself

While everyone is free to believe what they wish, it is better to avoid expressing strong political, religious or spiritual beliefs in the workplace. Such subjects are divisive and can easily lead to friction between employees and clients/customers. This is detrimental not only to workplace morale but also to the organisation's performance levels and, therefore, profit margins.

Be mindful of possible resistance

During the conflict resolution process, you might experience resistance to recognition of problems or problem-solving.

This resistance may take the form of:

- Resistance to examining different values
- Resistance to acknowledging cultural stereotyping or bias
- Denial of the existence of conflict
- A tendency to blame others for causing problems
- Looking for the right time to deal with conflicts (and therefore postponing conflict resolution).



Activity 2C



2.4 – Make efforts to resolve misunderstandings, taking account of social and cultural considerations

Addressing difficulties and seeking assistance

As explained in 2.2, when a social or cultural issue leads to conflict or misunderstanding in the workplace, you need to address the situation as soon as possible.

There are several ways of addressing such difficulties.

Listen

Listening is widely acknowledged as a key conflict prevention and resolution skill. Care should be taken not to impose an approach to listening that causes discomfort. You should also remember that not all cultures are comfortable expressing feelings in public.

Used in a team environment, effective listening can enable individuals to achieve a greater mutual understanding and level of maturity.



Consider the Platinum Rule

The Platinum Rule is to treat others as they would like to be treated rather than the way we like to be treated (the golden rule). It is similar to the difference between sympathy and empathy. Empathy is not about "walking a mile in his/her shoes" but imagining "how he/she feels walking in his/her shoes." Problems with the platinum rule arise when your way and the others way clash.

Remember that different interactions require different responses

The relationship/s between the people involved in any given conflict will help to determine how the conflict should be resolved.

For example, the different levels of power held by different staff members and between staff and clients will influence the resolution strategy. If the person in power is the one whose behaviour has created the conflict, it will be harder for the other person to stand up for themselves, which means that extra care should be taken to ensure both parties are satisfied with whatever course of action is taken.

Guidelines for resolving conflicts

Regardless of the specifics of the conflict itself, there are a number of guidelines to bear in mind when it comes to addressing the situation.

You should:

- Never assume that all disputes that involve people of different cultures necessarily have a cultural component
- Provide a thorough explanation of the dispute resolution process; never simply assume that what you are saying is being understood
- Provide for, or allow for, the use of interpreters

- Respect the other person's point of view
- Ask for frequent expansion on points that you are unfamiliar with, especially if they relate to cultural issues
- Investigate the cultural norms of the people that are involved in the dispute; this is also useful for checking the validity of cultural claims
- Recognise and investigate the cultural differences at play in the use of body language, emotions and problem solving
- Educate those from other cultures on the values and norms of our society
- Be patient, flexible and diplomatic at all times.

Seeking advice and assistance

Some conflicts are so entrenched that they cannot be solved by the participants alone; outside help is needed in the form of conflict mediation.

Mediation involves finding a third party trusted by the people involved in the conflict and then trusting that third party to help find a solution.

The mediator/assistance could be:

- A manager, supervisor or co-worker
- A business coach
- Organisations that specialise in cross-cultural practice
- Ethno-specific services for advice or cultural consultation
- Government agencies
- Diplomatic services
- Disability advocacy groups
- Educational institutions
- Interpreter services
- Local cultural organisations.



To determine whether or not you need help:

- Ask, 'Is help needed?'
- If the answer is 'Yes', act as soon as possible
- Decide what kind of help you want
 - do you need someone to work with you to help you find a solution?
 - or do you want to outsource the entire conflict resolution process to a third party?
- Make contact with the appropriate parties.

Activity 2D



2.5 – Escalate problems and unresolved issues to appropriate supervisor or manager for follow-up

Referring problems and unresolved issues to appropriate persons

Once you have discussed the issues with all or both parties involved in a cultural conflict or misunderstanding, you need to decide whether you will be able to mediate the issue yourself, or whether you will need the help of supervisors/managers, HR or external mediators.

Referring problems to supervisors and managers

It is part of a supervisor/manager's job description to handle workplace conflicts that are getting out of hand.

They can use their authority to:

- Organise meetings
- Control a discussion
- Help parties find common ground
- Set rules for future interaction
- Fire people, if necessary
- Send staff members on inclusivity training courses
- Separate team members involved in conflict
- Produce new guidelines that prohibit certain behaviours.



Referring problems to professional mediators

Although managers and supervisors often successfully resolve simple disputes involving two people that have only been alive for a few hours, days or weeks, it is best to leave complex and long-standing issues involving a number of people for experienced mediators to deal with. These kinds of workplace conflicts are often sensitive and require high-level skill to bring them to a resolution.

As described in 2.2, a mediator/assistance could be in the form of:

- A manager, supervisor or co-worker
- A business coach
- Organisations that specialise in cross-cultural practice
- Ethno-specific services for advice or cultural consultation
- Government agencies
- Diplomatic services
- Disability advocacy groups
- Educational institutions
- Interpreter services
- Local cultural organisations.

Activity 2E



Summative Assessments

At the end of your Learner Workbook, you will find the Summative Assessments.

This includes:

- Skills assessment
- Knowledge assessment
- Performance assessment.

This holistically assesses your understanding and application of the skills, knowledge and performance requirements for this unit. Once this is completed, you will have finished this unit and be ready to move onto the next one – well done!

References

These suggested references are for further reading and do not necessarily represent the contents of this unit.

Websites

Types of disabilities: <http://www.hwms.com.au/Resource-centre/Types-of-disabilities>

All references accessed on and correct as of 08/03/2017, unless otherwise stated.