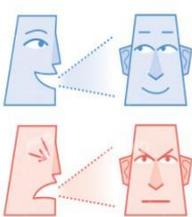


Training and Assessment Guide

Deliver and monitor a service to customers



Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to identify customer needs and monitor service provided to customers. This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgment using appropriate theoretical knowledge of customer service to provide technical advice and support to customers over either short or long term interaction.

When you have completed this unit you will be able to:

- 1 Identify customer needs



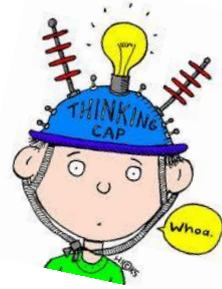
- 2 Deliver a service to customers



- 3 Monitor and report on service delivery



UNDERSTANDING THIS TRAINING GUIDE



This training guide is designed especially for you. It provides basic information to assist you with delivering and monitoring a service to customers. The guide is intended to support the practical classroom training you will receive. You can use this training guide for review but it may also be a useful reference document in the work place.

The Training Guide is broken into chapters based on the elements and performance criteria you will be assessed against at the end of the course. As you work through the chapters:

- **THINK** about what you have learnt so far
- **DISCUSS** the course content with someone
- **UTILISE** your own experience to compliment the skills learnt

DOING THE ASSESSMENT ACTIVITIES

Each of the assessment activities gives you the chance to:

- **CHECK** your progress
- **APPLY** everything you have learnt so far
- **GATHER** information that will be useful on the job
- **DEMONSTRATE** your competence



All assessment activities are located in the assessment book. Look for the star symbol at the end of each chapter. Your Trainer/Assessor will stop you at this point and you will be asked to complete the assessment activity relating to that chapter.

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1 Identify customer needs

Every client is different and will expect different things from you. That's why it's important to be able to clearly identify your client's needs. The key to identifying your client's needs is to build a relationship with them, make them feel comfortable, get to know them and their expectations, ask questions and offer suggestions. To provide an excellent level of customer service you will also need to be aware of the services provided by the Agency and who to refer the client to if there are any issues or concerns.

In this chapter you will learn to:

- 1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations
- 1.2 Assess customer needs for urgency to determine priorities for service delivery in accordance with organisational requirements
- 1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options
- 1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals



1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations



Interpersonal skills are the skills you need when you, as a person, communicate with another person. Some people have a better understanding of the needs of others and know how to please them because they have learnt to watch and listen rather than do all the talking. Other people have such a warm and friendly manner that the people they meet immediately feel at ease and comfortable with them.

Interpersonal skills can always be improved and refined so that you can achieve the best possible communication with your clients. You can do this by practicing your existing skills or by developing new skills.

Understanding your client's needs and the type of cleaning they require will make it easier for you to do your job efficiently and effectively. When you first meet a client it's important to try and establish a relationship with them. You will initially need to remain the listener in the conversation.



Take notes and try to avoid butting in as this will only annoy the client and you will become disadvantaged by not giving yourself enough time to listen and understand what the client wants. In order to meet the client's expectations you must first comprehend what the client's cleaning requirements are. Active listening, such as paraphrasing and asking 'open' and 'closed' questions will enable you to hear and clearly understand what your client wants and expects from you.

Why listen? When you actively listen to your client you are:

- showing them that they are important and worthwhile
- interested in who they are
- developing trust and confidence

Paraphrasing is when you repeat back what you've heard to the sender but in your own words. By doing this you are able to clarify your understanding of what's been said.

Open questions are used to extract more information. They usually begin with how, what, when, where or why. For example, "How did you manage to get the stain out?"



Closed questions are generally used when you are after a factual and short response. For example, "Are you hungry?" The answer will be "Yes" or "No". Think about the questions before you ask them and consider the responses you are after. This will enable you to ask the right questions.

When trying to ascertain what your client's cleaning requirements might be, consider asking the following questions:

- What are your expectations?
- What levels of service will satisfy you?
- What would you like cleaned?
- How would you like it cleaned?
- Do you have any special surfaces that need special products or attention?
- Do you have any specialised equipment?
- What is the best way to use that (product or equipment)?

It's important that you never assume to know what the client wants. Most importantly don't assume that you automatically know more about cleaning than the client does because cleaning is your job. A client may have a delicate surface or require you to clean something that you have never seen before. In these instances it's important to ask questions in order to clearly understand the clients requirements.



There is no doubt that a know-it-all attitude can seriously undermine the client/cleaner relationship. Clients wanting a cleaner know that they are engaging an expert; you do not have to prove it. A condescending tone of voice, a hint of boredom or the overuse of cleaning jargon will alienate the client.



Your role as a professional cleaner requires you to remain courteous at all times. Common courtesy means that:

- You listen actively to the client's cleaning requirements without interruption
- You wait until the client has finished telling you about their requirements before you tell them how you will go about your cleaning
- You will paraphrase the client's requirements clearly and concisely using jargon free words
- You end the conversation by politely asking the client "Is there anything else I can help you with?"



1.2 Assess customer needs for urgency to determine priorities for service delivery in accordance with organisational requirements

At [REDACTED] we inform the client when they make their initial enquiry that the cleaner works to their requirements. This is a large selling point for the company and it's something the Agency strives to achieve every day. It's important that you as the cleaner also strive to achieve this. By this we mean that you will:

- clean as the client requests you to clean
- do the cleaning tasks the client sets for you
- use the products and equipment selected by the clients

The only time this would differ would be if you were to identify that the products and equipment selected by the client might damage or harm the surface in which you are to clean. If that happens you would need to discuss options with the client and provide an alternative solution for them.

Quite often you will arrive at a client's home to discover a list of cleaning tasks that need to be completed. Although we encourage the client to prioritise this list for you, you will find that on most occasions it will generally be up to you as the cleaner to use your initiative and assess what needs to be done first. When prioritising the tasks you need to take into consideration the amount of time the client has booked. Sometimes you may not have the time to complete all of the tasks set and it's times like these that you will have to re-evaluate your workload and prioritise the cleaning tasks according to urgency. Discussing this with the client will aid in achieving a positive result.

Most clients will want the bathrooms, toilets and floors done every week so it's important to ensure that these tasks are completed. On occasions the client's priorities may change due to a variety of reasons, such as:

- friends/family visiting - the client may request you clean some windows, dust some skirting boards or clean the blinds
- carpets being cleaned - the client may require you to devote extra time and attention to giving the carpets a thorough vacuum
- renovations being done - you may need to pay particular attention to a room in the home for the entire clean
- a party – you may only need to clean bathrooms and the room the party will be in



These are the types of things you will need to consider when assessing your client's needs for urgency to help determine their priorities. If these requests were made on a normal cleaning day they may not necessarily be an urgent cleaning task and you might decide to get to it if you have the time, but when the client has another agenda such as one of the items mentioned above then the task will have an urgency to it, therefore making it a priority.

It's important to all parties concerned that [REDACTED] and you as the cleaner deliver on what we promise on every occasion. This is called "Under promise and over deliver". You will never have a dissatisfied client if this is your approach. Avoid giving an unrealistic expectation as the Agency and the client will expect you to meet it. If you promise to deliver something and fail to achieve it then this is called "Over promise and under deliver".

This outcome can be detrimental to you and [REDACTED] as it could mean the loss of not only one but several clients. Negative experiences are discussed more readily with friends, colleagues and relatives, than positive. There is no point saying you can do something when in fact you can't, so be honest.

1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options

To be effective in life, you have to communicate well.

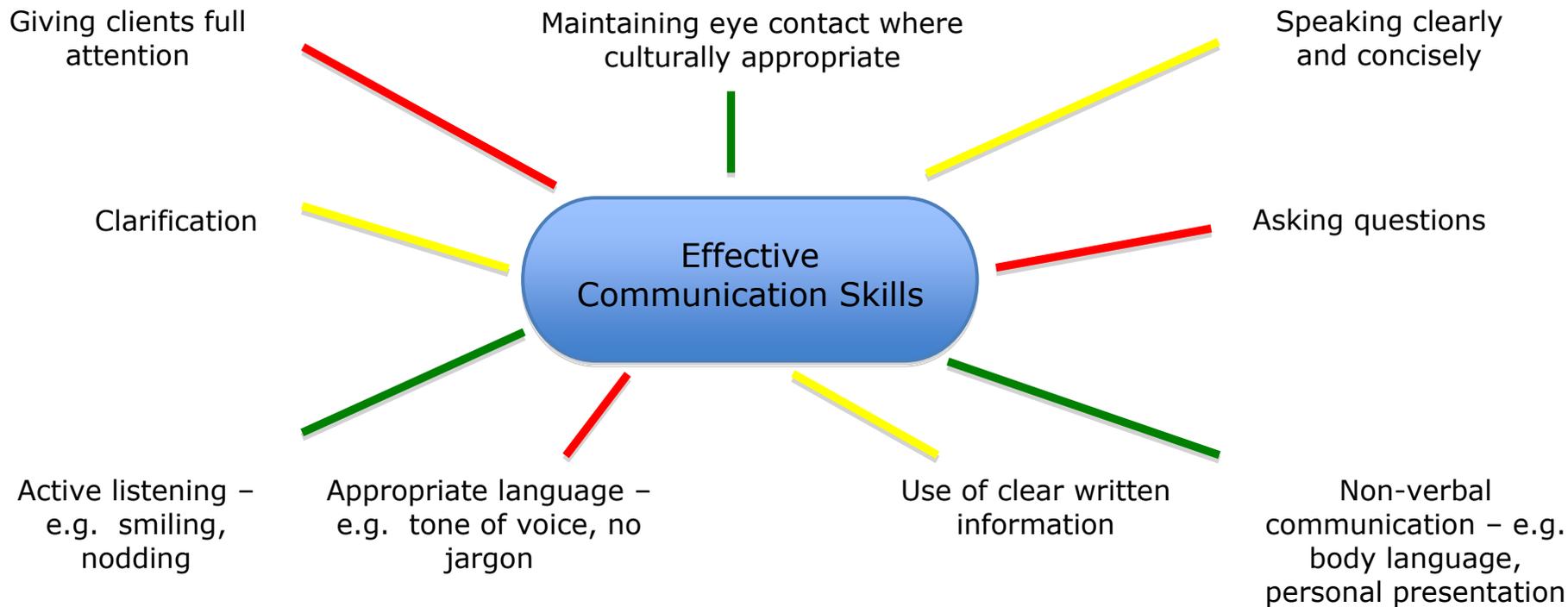
Being an effective communicator takes real skill. The greater your awareness of how communication works, the more effective your communication will be.

Everyone communicates differently and sees the world differently. The greatest skill you can have in order to instantly and significantly improve your communications skills is to understand the other person's point view and how they see the world. Then you can adjust your own communication to take that into account.

Non-verbal communication. Remember, everything communicates. If you aren't clear about what you mean and what your intention is, the other person (or people) could easily misinterpret what you mean.

What you do matters as much as what you say. Your behaviour will 'read' unconsciously to other people, it is therefore important to be aware of your body language – your personal presentation, facial expressions and hand gestures.





Effective Communication Skills

Maintaining eye contact where culturally appropriate

Speaking clearly and concisely

Asking questions

Non-verbal communication – e.g. body language, personal presentation

Use of clear written information

Appropriate language – e.g. tone of voice, no jargon

Active listening – e.g. smiling, nodding

Clarification

Giving clients full attention

Did you know that clients and customers will judge an entire company based on a single service experience? Therefore it is very important that every client has a positive experience. You make the difference. You are [REDACTED]. How you act, look and talk projects an image for the Agency. It is therefore important that you use effective communication skills and are knowledgeable about [REDACTED] products, services, prices and procedures.

In order for you to provide the client with accurate and relevant information you need to have a general understanding of the services we offer at [REDACTED]. This type of information can be sourced from your Team Manager, the [REDACTED] website and promotional material such as brochures and the Communication Booklet.

Products and Services

At [REDACTED] we provide the following services:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- [REDACTED]



Prices

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Prices may change over time so always check with your team manager.

1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals

There will be the odd occasion that you will not be able to provide the client with the information or service they need. This could be due to many reasons. You may not have the skill or expertise to complete what's been requested or the Agency may not provide the service. It's important to be honest with the client and know your limitations. The client would prefer you to seek advice than to attempt something and damage their property.



Politely advise the client that you do not have the expertise to complete the task however you will endeavour to find out how to do it or alternatively contact the Agency for assistance. Remember your Team Manager is always there to help. They will either provide you with a solution to the problem or do some research and get back to you as soon as possible.

In some instances the Agency may need to provide another cleaner. This may be the case if the client requires:

- their carpets cleaned
- a spring clean or move out clean
- an ironing service (as this may not be something you do)



On occasions you may have to get back to the client with the information they have requested from you. Whatever action you take when responding to the client always ensure you keep the client informed and up-to-date with your progress and let them know when to expect a response.



Work colleagues, the Internet and cleaning industry experts may also be able to assist with any specialised cleaning related enquiries.

**PLEASE TURN TO YOUR ASSESSMENT BOOK TO COMPLETE
THE ASSESSMENT TASKS FOR THIS CHAPTER**

