Task Planning Sheet

Task 7 – Dealing with customers

The Task Planning Sheet is designed to provide you with a clear list of the activities you will need to undertake to complete your assigned tasks. It is suggested that you complete the activities in the order they are listed. You must submit your completed ‘Task Planning Sheet’ to verify completion of the competencies that form a part of this task.

By submitting your completed sheet, you are confirming that you have undertaken all activities associated with the task.

**Training Program:**

* Access, read and print as necessary ***Learning Resources*** (Task page) and ***Your Task 7***. (Inbox); Establishing contact with customers

Building customer relationships

Customer needs

Customer Service

* Complete the personal improvement plan activity in the Customer Service training package (Task page).
* Ensure you have basic competency in Microsoft Word. (Virtual RTO).
* Use the Virtual RTO or alternate resources to gain intermediate skill in using Word (or an alternative, similar word-processing package), and Outlook (or an alternative, similar email/productivity package).

**Task A - Collecting a range of data to address a potential customer’s needs:**

* Read the incoming email (Intray).
* Read Your Task (Task page).
* Compile the responses to the three points and other information into a readable and cohesive document.

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| **What to submit** | **Problems encountered and strategies used to overcome these** |
| Description of the process you would undertake to gain the information that your potential customer (Sarah) needs to gain to decide on a purchase of a support package – email this to your supervisor (Teacher).  Note: Ensure you address the three points listed. |  |

**Task B – Conflicting priorities in customer service**

* Respond how you will deal with immediate requests from internal and external customers.

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| **What to submit** | **Problems encountered and strategies used to overcome these** |
| Paragraph response of between 200 and 300 words outlining how you will deal with this situation. |  |

**Task C – Handling a complaint:**

* Read the complaints policy of Anjark Services (Intranet).
* Compile the responses as required in the Your Task document and other information into a readable and cohesive document.

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| **What to submit** | **Problems encountered and strategies used to overcome these** |
| Description of how you will deal with this customer, identifying actions that need to occur to not only resolve the problem but also to prevent it from re-occurring. You also need to list the styles and types of communication you would use to calm the customer and detail the information you would share with him. Email this to your supervisor (Teacher). |  |

**Task D – Handling a complaint:**

* Read the complaints policy of Anjark Services (Intranet).
* Compile the responses as required in the Your Task document and other information into a readable and cohesive document.

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| **What to submit** | **Problems encountered and strategies used to overcome these** |
| Description of how you will deal with this issue, identifying actions that you need to occur to not only resolve the problem and address the customer’s concerns and needs. Email this to your supervisor (Teacher). |  |

**Task E – Complete the Customer Service Questionnaire:**

* Complete the questionnaire and print out the result sheet.

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| **What to submit** | **Problems encountered and strategies used to overcome these** |
| Email the printout of the result sheet to your supervisor (Teacher). |  |