Customer service
Introduction to Module 1

Customer service is at the heart of all retail activity. In a highly competitive industry, it is perceived to be the single most important factor that influences people's choice between one outlet and another. Customer service has also been identified as an area within the sector in which there are skills gaps.

This module will support learning for NVQ Unit D1 in Retail Operations and other units related to customer service. The themes give learners opportunities to find out more about customer service and to develop the following communication skills:

- recognising customer needs
- responding to customers
- using the telephone
- advising customers and promoting services
- dealing with complaints and returned goods.

In order to support learning in this aspect of retail, many of the activities include audio clips, which are available on the accompanying CD.

Retail – Module 1: Customer service

Theme	Page reference	NOS/NVQ	Literacy	Numeracy	Key Skills
What is customer service?	Re 1:1–1:2	D.1	SLc/L1.3; SLd/L1.1; SLlr/L1.5; Rt/L1.5		C1.2
Recognising customer needs	Re 1:3–1:4	D.1; C.5	SLlr/L1.3; SLc/L1.2		
Responding to customers	Re 1:5–1:8	C.5	SLlr/L1.3; SLlr/L1.4; SLlr/L1.6; SLlr/L1.2; SLc/L1.1; SLd/L2.2		
Speaking and listening to customers on the phone	Re 1:9–1:12	C.5	SLlr/L1.1; SLlr/L1.3; SLc/L1.1; SLc/L1.3; SLlr/L2.1; Rt/L1.5; Rt/E3.4; Wt/L1.2; Rt/L3.7; Rt/L3.9		
Advising customers	Re 1:13–1:16	C.3	SLlr/L1.1; SLlr/L1.4; SLlr/L1.3; Rt/E3.8		C1.1
Dealing with complaints	Re 1:17–1:18	D.3	SLlr/L2.1; SLlr/L1.1; SLlr/L1.3; SLlr/L1.4; SLlr/L1.5; SLlr/L1.6; SLc/L1.1; SLc/L1.2; SLc/L1.3; SLc/L1.4		C2.1a
Promoting services	Re 1:19–1:20	C.12	SLc/L1.1; SLc/L1.3; SLc/L1.4; Rt/L1.1		
Dealing with returned goods	Re 1:21–1:22	B.12	Rt/L1.1; Rt/L1.4; Rt/L1.5; Rt/L2.2; SLlr/L1.1		C1.2; C2.2

Skills checklist

You are dealing with people all the time in retail, and customers and colleagues expect you to be friendly and efficient at work. Good customer service will make customers come back to your shop again and again. Customer service is not just about being polite to people and dealing with their enquiries. It is also about understanding customers' needs and being prepared to put yourself out to help them.

Good communication skills are vital in retail, so that you can respond to a wide range of people. These are some of the communication skills you will need in order to be able to provide good service to your customers. Tick all the skills you have already and then look at the checklist again when you have used the materials.

Skills for good customer service	Now	Later
Understanding customers' needs		
Responding to customers' needs		
Talking to customers face to face		
Giving information on the phone		
Giving advice to customers		
Promoting sales to customers		
Dealing with problems and complaints		

PAGES 1:1–1:2

What is customer service?

Occupational setting

Customer service is at the heart of all retail activities and yet has been identified as an area where there are skills gaps in the sector. For customer service to be good enough to make a difference, it has to be uniformly excellent; knowledge, practice and experience are needed to achieve this. Many people who choose retail as a career do so because they enjoy dealing with people and this provides an excellent starting point. To achieve excellent customer service, employees need a good understanding of the wide range of customer needs, a positive and consistent approach to delivering service and an understanding of the consequences of their individual actions.

Customer service requires high-level speaking and listening skills and these will need to be taught carefully. ESOL learners in particular may need significant support to develop a repertoire of appropriate phrases to use with customers. All learners will need to develop an understanding of body language and its appropriate use. It will also be useful for learners to consider different cultural conventions that apply to visitors from abroad and a range of cultural groups within the UK.

These two focus pages reflect the performance criteria (PC) from Unit D1 and will help learners to achieve competence in this unit. It is intended to spark discussion about different facets of dealing with customers, including such things as cultural and ethical differences and equal opportunities.

Materials

Performance criteria from Unit D1 of the Occupational Standards from the Source material (0:01)

Workplace guidelines, policies and procedures relating to customer service

Relevant training video

Learning outcomes

1 To understand the principles of good customer service through discussion (focus pages)

2 To read and interpret the PC from the Occupational Standards (focus pages)

Introduction

- Ask the group what they understand by customer service and how they expect to be treated as a customer. What would make them return to a shop? What would make them go elsewhere in future? What pleases them (e.g. full attention of assistants)? What really annoys them when shopping (e.g. assistants chatting to each other when serving, being served in wrong order)? Write ideas on the board or flipchart.
- If possible use a training video on customer service to introduce the topic from the point of view of the retail worker. Play clips that highlight some of the issues around customer service.
- Who do they think is responsible for delivering good customer service?

Focus pages

- Note: the tasks for this theme are integrated into the focus page.
- Point out the information on banners at the top of each page. Discuss.
- Make sure learners have a copy of the Performance criteria from Unit D1 of the Occupational Standards from the Source material. Read through these standards together, thinking about what each means for learners at work. Interpret any difficult language or encourage learners to use the product glossary. Learners will benefit from keeping a personal notebook or section in their folder with words that they want to remember. The definitions for these words should be in their own words.
- Look at the cartoons and discuss the first one as a group. Pick out any clues from the setting, the body language or the facial expressions that indicate what is happening. Use the cartoon to initiate discussion about aspects of customer service that it illustrates. Relate these to the PC in D1. For example, is the service assistant:

  - Greeting the customer in a way that is appropriate to his needs? (PC B)
  - Communicating with the customer in a way that makes him feel valued and respected? (PC C)
  - Selecting an appropriate way of communicating with the customer that suits his individual needs? (PC I).
- Relate the whole discussion to appropriate company guidelines and to general points about adapting language to suit context and audience. Include points involving equal opportunities, etc.
- Ask learners to follow the same procedure for the other cartoons in small groups or in pairs (i.e. relate each cartoon to the PC in Unit D1, and company guidelines if appropriate). If necessary, cut out the PCs so that they can be moved around the pages, or produce a table or list on the board that can be referred to. Cartoons may relate to more than one performance criteria.
- Discuss as a group the points raised by each cartoon. Encourage open discussion so that learners become familiar with the issues raised and comfortable with the language and style of the performance criteria statements. Address any concerns and raise awareness of less obvious cultural issues.
- Ask learners to go through the PCs from Unit D1 of the Occupational Standards and identify opportunities or situations from their experience that would satisfy each PC.
- Discuss personal examples of good and bad practice in customer service that learners have experienced as shoppers themselves or have observed at work. Learners can then fill in the scrolls on the focus pages with examples of best and worst examples.

Curric. refs	NOS/NVQ	Key Skills
Rt/L1.5 SLlr/L1.5 SLc/L1.3 SLd/L1.1	D.1	C1.2

What is customer service?

Focus

Customer service includes all the activities an organisation carries out for its customers. Excellent customer service means putting the customer first.

Examples of excellent customer service

Reasons for paying a return visit to a shop

Focus

Everybody in the store is involved with service to the customer. The staff should be friendly, helpful and knowledgeable about products and services.

Examples of bad customer service
Reasons for not returning to a shop

PAGES 1:3–1:4

Recognising customer needs

Occupational setting

In a highly competitive market such as retail, good customer service can be the one thing that makes a customer return again and again. Good customer service depends on a range of good communication skills, in order to recognise and respond to customers' needs. This focus page is about recognising customer needs by observing and interpreting non-verbal signals such as body language and behaviour. The contents reflect performance criteria (PC) found in D1 and C5 of the Retail Occupational Standards and in Module 1 A:ii of the Technical Certificate (*How and when to offer advice, information or assistance*).

Materials

Video clip from a TV 'soap' or 'fly-on-the-wall' documentary (if available)

Examples of customer feedback forms

Learning outcomes

1 To understand and use non-verbal signals to interpret customer behaviour (focus page, Task 1)

2 To use different strategies to clarify and confirm understanding (focus page, Task 1)

3 To ask questions to obtain information or to establish a customer's needs (focus page, Task 1)

Introduction

- Play a video clip (from a TV 'soap' or 'fly-on-the-wall' documentary) without the sound.
- Discuss with learners how they know what people are feeling even though they can't hear what they are saying. How can they tell? What non-verbal signals do they see? List these on the board. Make sure the list includes different aspects of body language and behaviour:
  - eye contact
  - facial expression
  - personal space
  - whole body posture
  - hand gestures
  - behaviour such as fiddling with things
  - looking around as if searching
  - walking pace – walking with/without purpose
  - actions that demonstrate anger or confusion, as well as those that show that a person is relaxed or comfortable.
- Replay the video clip to affirm the group's interpretation.
- This activity can then be repeated in pairs with another video clip. (It is important that the clip shows a range of feelings but is not too obvious.) The idea is for learners to pick up on the subtleties of body language as well as the more obvious clues.
- It is important to realise that dyslexic learners often interpret situations differently; you need to anticipate and respond to this. ESOL learners may also interpret body language differently. Any differences of opinion should be treated positively and valued. They help to illustrate the importance of checking with the customer first if they require any help.

Focus page

- Point out to learners that, in many cases, customers will ask for assistance if they need it. In some circumstances, however, customers may not feel confident about asking for help but will give non-verbal signals. In this case it is up to the customer assistant to recognise the signals and then to find out if they can help.
- Look together at the first picture. What are the signs that this customer may need help? Ask learners to look at the setting and clues around the customer as well as at the customer's body language. Use the list of signs on the focus page and the points raised in the first part of the session.
- Raise the issue of making assumptions about people – this man is elderly so therefore he needs help; this person is in a wheelchair, etc. What are the dangers of this and the consequences of inappropriate questions or actions?

- Ask learners to find out if there are any guidelines in their store relating to equal opportunities or communicating with disabled customers.
- Having established that there may be a need, discuss the next step with the learners: what can they say to the customer to find out if they have read the situation correctly? How can they establish the customer's needs? Learners may come up with a range of questions here that they could ask the customer. It is important that the questions are open ended, do not make assumptions and do not invite negative responses about the organisation or store (e.g. These bags are rubbish aren't they?).
- ESOL learners will need further support to practise questions with the appropriate intonation.
- Learners have now recognised and established the customer's needs.
- Ask learners to repeat in pairs the process with the second picture using these questions:
  - What might be the problem here?
  - What are the signs that tell me this?
  - What can I say to the customer? (This includes wording of questions and intonation.)
- It is essential that ESOL learners can use the appropriate language form and intonation pattern to approach this situation.
- Discuss real work situations in which particular offers of help might be given (such as offering to fetch a trolley for a person who is struggling with a full basket). Emphasise that if, in doubt, it is best to ask the customer if help is required rather than assuming the sort of help the customer needs.

Curric. refs	NOS/NVQ	Key Skills
SLlr/L1.3	D.1	
SLc/L1.2	C.5	

Task 1

Recognise customer needs by reading non-verbal signals
SLc/L1.2
SLlr/L1.3

- Explain to learners that the idea of the task is to use non-verbal information (body language) and the clues from the setting to recognise that a customer may need assistance.
- Remind them that many situations have more than one explanation and to think of the alternatives.
- For each graphic, ask learners to think about:
  - what the problem might be
  - what signals or clues they are using to decide
  - what they can say to the customer by way of offering help.

If the learner has difficulty

- Discuss each graphic with the learner and encourage them to make judgements by asking direct questions: *What can you see in the picture? Why do you think the man is at the bottom of the escalator?*
- It is important that learners do not feel that there is only one correct answer to these scenarios. Encourage them to think of more than one thing to say to the customer, as long as it is based on their observations of the clues available.

Extension

Give learners some examples of customer feedback forms to go through and think about appropriate ways to respond to the suggestions.

Theme assessment

- Ask learners to find out about access in their own workplace, such as entrances, exits, stairs, layout, lifts, ramps, etc. They should find out whether there are particular problem areas for some customers.
- Ask learners to find out about and discuss as a whole group the things you should and should not do when assisting disabled customers (they can find information from written work documents and observation). Ask learners to come up with a list of 'Dos and don'ts' for assisting disabled customers.

Recognising customer needs

Focus

Some customers ask for help when they need it whereas other customers may just give non-verbal signals that show they need it. It is up to the customer assistant to recognise the signals and find out if they can help.

Watch for signals that show a customer needs help, such as:

- looking confused, angry or upset
- wandering around
- constantly picking things up and putting them down again
- sighing, frowning or muttering.

1

2

Use the signals to help you decide what sort of help the customer might need. Then either:

- ask if the customer requires any help

or

- offer particular help in a polite way.

BUT

Don't:

- make assumptions
- say negative things about the products or staff.

Look at picture 2 and discuss with a partner:

- What might be the problem here?
- What are the signals that tell you this?
- What could you say to the customer?

Tip

Find out if there are any particular procedures in your workplace for offering help in different situations.

Recognising customer needs

Task

Task 1

How good are you at recognising customer needs?
Look at these pictures of different customers and answer the questions.

Tip
Look at the pictures carefully to see the signals being given.

1

a What might be the problem here?

b What are the signs that tell you this?

c What could you say to the customer?

2

a What might be the problem here?

b What are the signs that tell you this?

c What could you say to the customer?

3

a What might be the problem here?

b What are the signs that tell you this?

c What could you say to the customer?

PAGES 1:5–1:8

Responding to customers

Occupational setting

Dealing with a wide range of people presents a challenge to everyone working at the front end of the retail sector. Employees must be able to adapt the way they respond to people, but also stay within customer service guidelines. This focus page is about responding to customers by listening actively, using positive body language and speaking appropriately to suit the situation. It reflects some aspects of Unit C5 from the National Occupational Standards.

Materials

Customer service video (if available)

Audio equipment

Learning outcomes

1 To understand the need to adapt responses to different people and situations (focus page)

2 To understand how to respond appropriately to a range of people and situations (focus page, Tasks 1–3)

Introduction

- Ask individual learners to list the people they have communicated with in the last 24 hours.
- As a group, discuss the categories of people they communicate with – friends, family, work colleagues, customers, team leaders, managers, shop assistants, bar staff, etc. Do they communicate in the same way with all these people? How does the type of relationship they have with the person affect the type of communication used? (e.g. Do they address friends in the same way as they address customers? Do they speak to strangers on the phone in the same way as they speak to their colleagues face to face?) As a group come up with a list of words to describe these interactions, such as chatty, friendly, polite, formal, businesslike, respectful, matey, loving, etc.
- Elicit from the group what determines these categories: tone and volume of voice, content of the interaction, the words used, body language used, etc. Write these on a board or flipchart as prompts.
- Ask the group to think particularly about communicating with and responding to customers. As a group, try to identify important principles and features of this interaction. Put ideas on the board or flipchart as a spider graph, to show the many facets of this interaction.
- If a training video for customer service is available, this will provide a good focus for these discussions.

Focus page

- Use the focus page to look at responding to customers by **listening** and **speaking**.
- Go through the examples of good practice for listening. Demonstrate or ask learners to demonstrate the difference between good and bad body language when listening. This may vary across cultures – ESOL learners may be able to broaden the discussion to include any cultural differences they have noticed.
- Complete a paired exercise in listening: ask one learner from each pair to leave the room. Explain to the remaining learners that they will ask their partner to describe something (e.g. an event in the past). They should demonstrate good listening skills initially but then start to show signs of not listening until they are clearly demonstrating that they are not listening or are not interested in their partner's explanation.
- Ask for feedback on this activity. *How does it make you feel if someone is not listening attentively?*
- Emphasise the value of repeating information to the customer to confirm what they want.

- Go through the tips and teaching points for speaking to customers. Ask learners to give examples from their own workplaces and discuss different policies in their workplaces for speaking to customers.
- Ask learners to give examples of greetings they use in different situations. Discuss which are appropriate with customers and why.
- ESOL learners may need further supported work on register and intonation, including evaluating their use.
- Explain that the phrase 'be sincere' means to mean what you say. In other words show that you genuinely want to help, or you are really welcoming a customer when you say 'good morning', etc.

Curric. refs	NOS/NVQ	Key Skills
SLlr/L1.3	C.5	
SLlr/L1.4		
SLlr/L1.6		
SLlr/L1.2		

Task 1 1

Understand and select appropriate ways to ask customers if they need help
SLc/L1.1

- Remind learners about using language and tone that is appropriate to the situation and to the customer.
- Describe the scenario and play the audio clips through once.
- Discuss some of the more obvious contrasts between the clips. Encourage learners to use language that describes types of interaction, such as formal, informal, familiar, insincere, positive, etc. Put these terms on the board or a flipchart as a reminder.
- Play the clips again and allow learners to complete the task. Give learners the opportunity to discuss any questions that they are unclear about. Play the clips again for learners to confirm their answers.

If the learner has difficulty

Play each clip in turn and discuss the appropriateness of the language and tone used. Ask questions about language and tone for each one. *Would you speak to a customer in this way? Why is this wrong? Is it the words that are wrong? Is it the way it is spoken? What are the positive things about this?* Unpick at least two clips with the learner and then encourage them to complete others with fewer prompts.

Extension

Write out a general greeting or offer of assistance. In pairs, learners try out different ways to say the same sentence by changing the tone and the emphasis on different words.

Task 2 1

Listen for differences in language and tone
SLc/L1.1

- Remind learners of the difference between formal and informal language, and of the occasions when they are likely to use each type of language.
- Play the audio clips through again for learners to pick out the most formal and the most informal clips. As a group, discuss the language and tone that helped learners to make their choices.
- Ask the learners how they can tell if a speaker is being genuine about offering help – this is about tone of voice more than language. Play the clips through again and ask learners to complete the last two questions.
- Play the clips one more time if necessary for learners to confirm their answers.

If the learner has difficulty

- Encourage learners to focus on the third question, having done the first two questions as a whole group.
- Play the audio clips again, one by one, stopping after each and asking questions about what the learners heard, for example, *If someone had spoken to you like that when you were in a shop, would you think that was appropriate?* etc.

- Repeat this process with question 4, asking questions about who sounds the most polite.
- ESOL learners will need practice in producing appropriate responses with the correct intonation.

Extension

Role-play in pairs situations in which learners offer help to customers unprompted. Decide on the best language and tone that gives the right balance between formality and informality and sounds as if you genuinely want to help.

Task 3

Understand and match appropriate responses to different situations with customers
SLlr/L1.3
SLd/L2.2

- Remind learners that their responses to customers will vary in order to respond to their differing needs.
- Work through the first situation as a group so that learners understand what they are being asked to do. Use at least one of the solutions in the boxes plus any other ideas learners have (accepting that there may be more than one solution).
- Explain to learners that there is often more than one solution to any one problem and there may not be one clear answer. It is acceptable to try more than one strategy with a customer as long as they fall within general customer service guidelines.
- ESOL learners will need lots of practice in saying the appropriate thing. They are likely to understand the 'strategies' as competent communicators in their own language, but will need examples of how to do this in English.

If the learner has difficulty

- Read through another scenario and the range of options to ensure that the reading does not interfere with the successful completion of the task. Discuss the options with the learner. It is often easier to make decisions like this based on a process of elimination – eliminate the options that are clearly *not* appropriate responses.
- Discuss any options that are less clear. Make sure learners understand all the language.

Extension

- Ask learners to think of another solution to each problem in case their first choice was not successful.
- Ask learners what they may say to the customers in scenarios 3 and 5. For example, 'Would you mind … '; 'Please could you …'.

Theme assessment

Ask learners to check in their workplace induction materials or training package for their own organisation's policy for these situations, then report back to the rest of the group. In this way, the correct procedure can be made clear to everyone.

Task 4

Identify positive and negative communication skills from training notes
SLlr/L1.3
SLlr/L1.4

- Some learners may be familiar with customer service training videos and will have come across these during their induction process. It will be helpful to show an example briefly as an introduction to this task.
- Ask learners to look at the notes on the page and discuss the scenario of being asked where products are in the store. Most learners working in retail will be familiar with this scenario and will have been given guidelines about dealing with the situation.
- Ask learners to go through the notes and to complete the table by identifying the positive and negative responses made by each person.

If the learner has difficulty

Go through each response in turn and discuss the merits of the reaction described in the notes. Ask if the body language described is good and positive. Does it demonstrate good customer service?

Extension

In pairs, learners discuss and add to the list of positive body language and negative body language they have observed at work.

Task 5

Describe the ideal way to respond to a customer enquiry
SLlr/L1.3
SLlr/L1.4

- Ask learners to decide as a group which of the responses to the customer enquiry was best.
- Discuss further improvements that could be made based on the extension from Task 4 or from their own knowledge of workplace practice.
- Write down or describe to a partner any improvements that can be made.

If the learner has difficulty

Encourage learners to decide for themselves what improvements can be made, using the ideas in the training notes as prompts. Encourage learners to look up the customer service guidelines in their induction or training materials if they have them.

Extension

Ask learners to find customer service guidelines in their own induction or training materials and check that their answer is correct.

Theme assessment

In pairs or small groups, learners create a poster that could be used to remind people in their workplace about responding to customers appropriately.

Responding to customers

Focus

Customers quickly make up their minds about the customer service you provide. You need good communication skills to respond to a wide range of people and adapt to their needs.

Listen *and show you are listening.*

- **Stop** whatever else you are doing.
- **Concentrate** on what the customer is saying. Don't get distracted.
- **Look** at the customer.
- **Confirm** that you have heard.
- **React positively** to what the customer says.

Body language *should be positive, open and reassuring.*

Examples

- Nod.
- Face the customer.
- Stand on the same level as the customer.
- Make eye contact.
- Smile.
- Arms unfolded.
- Lean slightly forwards.

Can you think of any more?

Speak *clearly using appropriate language and tone of voice.*

When you greet customers or offer help:

- be polite – not too formal or informal
- be sincere – mean what you say.

Adapt *to different customers and situations.*

Remember, every situation is different.

- Treat customers as individuals.
- Consider each customer's personal needs.
- Think about positive ways to help each customer.
- Deal with things yourself as far as possible.

Responding to customers

Task

Task 1

1

Listen to these assistants speaking to a customer who is searching through a rail of clothes in a store. Put a tick by the ones who speak in an appropriate way and a cross by the ones who do not speak in an appropriate way.

a ☐

b ☐

c ☐

d ☐

e ☐

f ☐

Task 2

1

Listen to the assistants again and answer the questions.

1 Which assistant uses the most informal language? _____

2 Which uses the most formal language? _____

3 Which one sounds least caring? Give a reason for your choice.

_____

4 Which assistant gives the best greeting overall? Give a reason for your choice.

_____

Remember!

Informal language is used in relaxed social situations, such as with friends.

Tip

Listen carefully to what is said and how it is said (the tone of voice used).

Responding to customers

Task

Task 3

Below are five different situations that could occur when you are talking or listening to a customer. Discuss each of the situations with a partner. Say what you would do in each case to help the customer.

Tips

- You can discuss the ideas shown in the boxes below or think of your own.
- There is more than one solution for some of the situations. Choose the one you would do first.

a Speak clearly and not too quickly.

b Repeat the information in a slightly different way.

c Ask the customer to repeat the question.

d Tell the customer that you will find out.

e Ask whether the customer would like you to repeat anything.

f Repeat what you think the customer said to check that you have understood.

g Fetch a senior staff member to talk to the customer instead.

h Take the customer to a different area.

i Ask the customer to speak up.

j Shout or speak very loudly.

1. You notice that the customer you are about to speak to has a hearing aid.
2. A customer wants to know why a particular item is not on the shelf.
3. You are trying to talk to a customer in a noisy department.
4. A customer looks confused when you answer his question.
5. A customer asks you a question but you only hear part of what she says.

Speak clearly and appropriately, adapting to different situations.

SLlr/L1.3; SLd/L2.2

Responding to customers

Task

These notes were made by a trainee while watching a customer service training video. They describe the way four trainee assistants reacted to a customer asking for help to find an item.

1 ***Listening to the customer*** Describe the body language used by each assistant when listening to the customer.	
Rufikat	Made eye contact and smiled. Nodded.
Steve	Smiled at his friend over the customer's shoulder now and then. Made eye contact with the customer rest of time.
Abdul	Remained standing on a kick stool, looking down at the customer. Looked at watch twice.
Gill	Leant against a pillar, arms folded. Nodded when customer finished speaking.
2 ***Responding to the customer*** Comment on how each assistant responded to the customer's question about where the shampoo is kept.	
Rufikat	Pointed to the aisle that displayed the product the customer required.
Steve	Took the customer to the shelf which had the product she required.
Abdul	Shook his head and shrugged. Moved away.
Gill	Led the customer up and down several aisles.

Task 4

Use the information in the notes above to complete the table of positive and negative body language and responses shown by each trainee.

Tip
Write in your own words.

Trainee	Positive body language/response	Negative body language/response
Rufikat	Made eye contact.	
Steve		
Abdul		
Gill		Didn't know where the product was.

Task 5

Using your table, discuss who reacted in the most positive way overall and how this assistant could improve on any negative responses.

Tip
Choose the person who has the most positive points.

PAGES 1:9–1:12

Speaking and listening to customers on the phone

Occupational setting

In many retail settings, customer service assistants will have to deal with telephone enquiries or take orders on the phone. As the first point of contact for customers, it will be vital that a good impression is created and maintained. Many new entrants to employment lack confidence on the telephone and will need clear guidelines and practice to establish these skills. This focus relates to Units D1 and C5 of the Occupational Standards and to the Technical Certificate in Retail Operations L2 Module 1.

Materials

Role-play cards

Audio equipment

Map on page 1:11 as an OHT

Dummy phones for role-play if available

Learning outcomes

1 To understand the range of interactions that they may have to deal with on the phone (focus page)

2 To identify and use good practice guidelines to carry out telephone conversations with customers (focus page, Tasks 1–6)

Introduction

- Discuss with the group the difference between speaking to someone face to face and on the telephone. What makes one harder or easier than the other? The key issue here is body language – or the lack of it when on the phone.
- Ask the group to think about reasons why they may speak to a customer on the phone. Responses to this will vary according to the type of business they work in and their own job role. Situations may vary from giving product information in response to enquiries about product availability to giving straightforward directions or dealing with customer complaints. These can be listed on a board or flipchart.
- Give learners role-play cards to complete a short role-play in pairs. These should be conducted on dummy or internal phones where possible or back to back so that body language is eliminated. Emphasise that as a customer service assistant they should try to follow good practice guidelines as much as possible. Customers may have a freer rein to 'drive' the role-play into a more difficult scenario, but should respond appropriately if the Customer Service Assistant demonstrates good practice when dealing with them.

Sample role-play cards

> You are a customer phoning to complain about the rude treatment you received from an assistant when you visited the shop last week.

> You are a shop assistant answering the phone. The manager is away and the shop is very busy.

> You are a customer phoning to find out whether a shop has a particular brand of mobile phone in stock. You live quite a way from the store and don't want to travel unless you know they have this item in stock.

> You are a shop assistant answering the phone. You work in the sports department of a department store. You have only been working here for a week.

- The greater the variety of role-play cards the greater the number of different combinations that can be played out in the group. This

activity can also be conducted in groups of three, with one person acting as an impartial observer.

- Some learners who are less confident or not used to role-play (such as ESOL learners) may prefer to act as observers for each pair in order to give feedback about the observation in a whole group discussion. This could help to throw up several important issues, including cultural differences and the sort of utterances used in English to show you are listening.
- Obtain feedback from each pair and/or observer about the role-play and identify what works and what doesn't work on the phone.
- Having established that there will be a number of different situations and a range of ways to deal with these situations, ask learners if the businesses they work for have a standard procedure for answering the phone and for dealing with enquiries or problems. In pairs get learners to make a list of good practice guidelines when dealing with customers on the phone. Make sure they think about the situations listed on the board.

Focus page

- Establish that on the focus page, items in green boxes are examples of good practice and those in red boxes are examples of bad practice. Go through these examples first, asking for comments about why one example is better than another. Ask learners for other good alternatives and procedures that they are advised to use in their own workplaces.
- Note: read out the item in the bottom right-hand corner without word spaces so that learners realise how difficult it is to listen when people speak very fast without pauses or punctuation.
- Note: the blank red box indicates that there is no response to the speaker to indicate that they are listening.
- As a group go through the bulleted lists of points for speaking and for listening on the phone. Learners can tick off items that they have already identified on their own lists and add extra items to the focus page if they have them. (Make sure learners understand what is meant by 'contact details'. Think of scenarios when contact details would be required from the customer, for example, the customer's name and address for posting information, the name, telephone number and possibly reason for calling back for telephone messages to be passed on, etc.)
- Discuss how you can let the customer know on the telephone that you are listening. There may be cultural differences so ESOL learners can help to extend the discussion. All learners will benefit from clear examples of the things you should and should not say.
- Leaving messages on an answer machine is also a difficult skill for some people. It is useful to go through these points and ask learners to complete this task using voice recorders. Allow individuals to listen to their own recording and evaluate themselves. More confident learners may be happy for their recordings to be played aloud and discussed by the group.
- With ESOL learners, take all the 'good' responses and support learners to practise saying them in an appropriate way.

Curric. refs	NOS/NVQ	Key Skills
SLlr/L1.1 SLlr/L1.3 SLc/L1.1 SLc/L1.3	C.5 B–F	C1.1

Task 1 2

Listen to a telephone conversation and identify good practice
SLlr/L2.1
Rt/L1.5

- Direct learners to the lists describing good speaking and listening skills when using the telephone.
- Explain to learners that they will be listening to a lengthy conversation between a customer and a sales assistant. Initially they should listen carefully and think about customer service and the general impression given.
- Ask learners to discuss any general issues about the conversation. Refer them to the lists on the focus page as issues come up. Encourage learners to think about the good points as well as criticisms they have.
- Play the audio clip through again and ask learners to tick items on the list if the sales assistant is doing them correctly. Allow discussion about this within the group or in pairs.
- Listen to the audio clip to allow learners to confirm any items they are not sure about.

If the learner has difficulty

This is a substantial amount for learners to listen to and absorb. Learners having difficulty will benefit from having the task broken down. Play the audio clip a bit at a time and assist the learner to go through the list on the focus page by asking direct questions: *Does the sales assistant use an appropriate greeting? Does she confirm the order correctly with the customer?*

Task 2

Pick out key information to complete a message to be left on an answering machine
Rt/E3.4

- Remind learners of the tips for leaving a message on an answering machine.
- Ask them to use the given information to complete the partially completed message.

If the learner has difficulty

- Check that learners understand the task and know where to find the additional information they need.
- Learners may find it helpful to read the partial message aloud to themselves in order to predict the missing words.

Extension

In pairs, learners practise recording the message using a tape recorder, a telephone answering machine or mobile phone and play it back to evaluate. Ask learners to think about speaking clearly and giving information such as telephone numbers slowly enough for someone to write it down.

Task 3

Create a message to be given to an answering machine
Wt/L1.2

- Emphasise the value of preparation if learners feel unhappy about leaving messages. This will ensure that they include all the information in a clear and logical way.
- Explain the task and remind learners that all the information they need is on the page. They should use their own name.
- Remind learners that it is a good idea to read the message through to a friend or partner to check that it is clear and contains all the correct information.

If the learner has difficulty

- Go through the task and ask the learner what they think the message needs to tell Mr Singh. Use the previous message as a model. Ask the learner which details they need to pass on. Construct the message using the details on the page and the message from Task 2. Encourage the learner to keep reading the message back to ensure that it makes sense.
- ESOL learners need further support on the delivery of the message.

Extension

Give learners a range of scenarios relevant to their own workplace and ask them to record suitable messages using an answering machine or mobile phone. Check that learners use the list of good practice for their speaking skills.

Task 4

Give clear directions to a customer
Rt/E3.7
Rt/E3.9

- Refer to the fifth point in the list of points for speaking on the phone (Give any information or directions clearly and in the right order.) Ask learners if they have ever given or been given directions. What is important about this?
- Introduce the scenario on the page but remind learners that they are giving these instructions on the telephone, so it is very important to get them in order and to be as clear as possible.
- Project the map onto a screen if you would like to complete this task as a group, or allow learners to work individually. If completing as a group, ask a member of the group to identify the route on the map by pointing and tracking the route as the task is completed.
- Identify with the learners the starting point using the speech-bubbles on the page.

If the learner has difficulty

- The instructions given in the speech-bubbles could be written onto cards or sticky notes for the learner to sort into order (with help if necessary). This will be a more suitable method for dyslexic learners and for learners with a strong kinaesthetic preference.
- If learners are having difficulty reading and understanding the map, they may need additional support, but can be encouraged to practise by using maps or plans of familiar places.

- Dyslexic learners may have difficulty with directional words and orientating themselves and will require extra support to tackle this.
- ESOL learners will benefit from work on prepositions and prepositional phrases.

Extension

- In pairs, practise giving directions using a shop plan or local map/atlas. (Use dummy internal telephones or learners can stand back to back.)
- Encourage learners to get the route clear in their minds before starting to give instructions.

Task 5 3

Listen to telephone greetings to identify different qualities in speech and the impression each gives
SLlc/L1.1

- Ask learners to reflect on the list of good practice and their comments and discussions during the previous tasks.
- Ask them to think about how different people **sound** on the phone and how they can change the way they speak to sound more positive, confident, interested or disinterested. Refer to the qualities of speech such as speed of delivery, volume, tone and emphasis and give examples of how this can change the way you sound and the clarity of what you say.
- Play the audio clips and ask learners to listen and comment on what they hear.
- Ask learners to listen again and use the spaces on the page to record their responses. Discuss the answers and ask learners to give reasons or to suggest improvements to what they have heard.
- Play the audio a final time for confirmation.

If the learner has difficulty

- Learners may be able to identify that an audio clip 'sounds wrong', but may find it difficult to identify why the example is incorrect. Put a list on the board of different aspects of speech that can be used as a checklist (e.g. speed – too fast, too slow, etc.) Learners should be aware from the example on the focus page that rapid speech is hard to comprehend.
- ESOL learners may benefit from practising the 'good' versions of these greetings.

Extension

Make up an alternative telephone greeting and try it out with the group.

Task 6 4

Listen carefully to a customer to identify their needs
SLlr/L1.1

- Remind learners of the need to listen carefully to customers and to identify their needs.
- Confirm that the clip is an example of poor communication.
- Tell learners they will only be able to listen to this clip once and must respond by identifying the requirements of the customer.
- Play the audio clip through once, asking learners to tick off the customer's requirements on the list.

If the learner has difficulty

- If the learner has been unable to identify all the items on the list, ask how they would respond to this customer. What questions do they need to ask to ascertain exactly what is needed?
- Some learners may need to hear the audio clip again but encourage them to listen carefully the first time and then continue with role-play to resolve the situation.

Extension

- Continue the conversation with this customer with a partner, confirming her needs and giving the correct information. Conclude the conversation correctly.
- Ask learners to discuss how they could interrupt the customer to clarify what she wants.
- Using the audio script, learners should role-play the customer and employee, using appropriate phrases for interruption and continuation.

Theme assessment

- In pairs, record or video a similar role-play conversation in which a customer telephones to ask whether certain ordered items have arrived. (Members of the pair should take turns at being the assistant and the customer.) Use dummy phones to help the role-play.
- Assess the recording using the checklists on the focus page and make particular note of whether proper confirmation of the details took place.

Speaking and listening to customers on the phone

Focus

STOP

You need to speak and listen carefully to customers on the phone. Add to the lists any extra things you can think of.

GO

When you speak on the phone make sure that you:

- ✓ Introduce yourself politely
- ✓ Speak plainly and clearly
- ✓ Use a tone of voice that shows respect
- ✓ Give the customer the information he or she requires
- ✓ Give any information or directions clearly and in the right order
- ✓ Ask questions to confirm that the customer has understood what you have said
- ✓ Offer any extra information that may be useful to the customer
- ✓ Take contact details if necessary
- ✓ Say goodbye in a polite and attentive way
- ✓

How may I help you?

What do you want?

This is the sports department.

You're … er … speaking … er … to … oops … are you still there?

Yes we have one copy of that book in stock. Would you like me to reserve it for you?

You'll get the last copy if you get here quick.

Can I put you through to another department?

I have no idea who you want.

Did you say you want to order a magazine?

Say that again.

Is that all OK or do you need more information?

'Bye then.

I see. Mmm. Yes I understand. Go on.

When you are listening to customers make sure that you:

- ✓ Listen carefully
- ✓ Concentrate on what the customer is saying
- ✓ Let the customer know you are listening
- ✓ Make your comments relevant to what the customer is saying
- ✓ Say goodbye in a polite and attentive way
- ✓

If you have to leave a message on an answer machine:

- ✓ Have what you want to say ready on a notepad
- ✓ Speak slowly and distinctly
- ✓ Introduce yourself and your company clearly
- ✓ Only mention important information
- ✓

ThisisJohnfromWaterfordswithamessage forMrsHaversaboutthebikesheordered thenicebluenewiththedrophandlebars ifyougiveusaringyoucanpickitup

This is a message for Mrs Havers.

Oh I hate these things …

Speaking and listening to customers on the phone

Task

Task 1

2

1 Listen to this shop assistant talking to a customer on the phone. As you listen, highlight all the things on the lists on the focus page that the shop assistant does.

2 Compare your list with a partner's. Discuss any ways the shop assistant could improve her telephone technique.

Task 2

Marcia has to leave a message on a customer's answer machine. Use the information on the notepad to fill in the missing words in her message.

Hello this is Marcia from _____ Brothers in Galway. This is a message for Mrs _____. This is just to let you know that the _____ you ordered are now in stock. We will keep them for you until Saturday _____. If you need any help, just give us a ring on _____.

Goodbye and thank you.

Brettles Brothers
Galway
Tel: 01632-776241

Shoes for Mrs Young in stock until Sat. May 12th.

Remember!
Be clear. Include only important information.

Task 3

You need to leave a message about a recent order on a customer's answer machine. Use the notes on the notepad to write a suitable message. Use your own name.

_____

_____

_____

_____

_____

Bits and Bobs
Top for DIY supplies in Shropshire
Tel 08081-570989

16th August

Order for spotlights placed by Mr H Singh now in stock. Will keep them for him for 3 working days.

Speaking and listening to customers on the phone

Task

Task 4

Number these directions in the order the assistant should tell the customer.

Can you tell me the way to your new store please? I know where the old one was but I'm lost after that.

You will pass a church on your left. ☐

Certainly. ☐

This time take the first exit and follow the signs to the car park on your left. ☐

If you need any more help, don't hesitate to call again. ☐

You know how to get to the old store? ☐

Have you got all that? ☐

Pass the old store keeping it on your right. ☐

Take the third turning off the roundabout. ☐

Follow the road round until you come to a roundabout. ☐

Keep going for about a quarter of a mile until you reach a second roundabout. ☐

Remember!

The customer cannot see you and you cannot see the customer – your voice must get across all the information the customer needs.

Ask questions to check that you are giving the information that the customer wants.

Ask questions to check that the customer is following what you are saying.

Give directions clearly and ask questions to check that what you are saying is understood.

Rt/L3.7; Rt/L3.9

Speaking and listening to customers on the phone

Task

Task 5

3

Listen to these assistants and decide how each assistant sounds to the customer.

1 too fast

2 _____

3 _____

4 _____

5 _____

6 _____

Tip

Your tone of voice will give the customer an impression of you and your workplace.

Speak as you would like to be spoken to.

Task 6

4

Listen to this customer and decide exactly what she is asking for. Tick the things on the list.

MESSAGE PAD

Customer called requiring:

(please tick as appropriate)

- ☐ appointment with personal shopper
- ☐ confetti
- ☐ cutlery
- ☐ handbag
- ☐ handkerchief
- ☐ hat
- ☐ matches
- ☐ overcoat
- ☐ rainproof coat
- ☐ shoes
- ☐ suit
- ☐ tights
- ☐ umbrella
- ☐ underwear
- ☐ wedding present
- ☐ wellingtons

PAGES 1:13–1:16
Advising customers

Occupational setting

Advising customers is an important part of customer service in many retail settings. In order to advise customers, staff will need good listening skills so that they can identify customer requirements, and up-to-date product knowledge.

Materials

Audio equipment

Customer requirements cards (to be made by teacher if required)

Baby and toddler car seats catalogue page from the Source material (0:02)

Learning outcomes

1 To listen to customers' requirements (focus page, Tasks 1–6)

2 To identify sources of information to improve product knowledge (focus page)

Introduction

- Ask learners to listen while you role-play a customer describing what they want, ensuring that there are a number of clear requirements and some things that the customer does not want (e.g. I'm looking for a present for my grandson. He's seven on Tuesday. He's mad about anything to do with dinosaurs. I don't want anything that has batteries because it's a nightmare to keep replacing them. He likes making things … I don't want to spend more than £20.)
- Ask learners to jot down this customer's requirements. Collate their ideas onto a board. Check that they have picked out all the correct information and clearly identified this customer's needs.
- Ask the group what they need in order to help this customer. Helping the customer depends on their own product knowledge or their ability to find the information required quickly so that they can advise the customer.
- Ask learners in pairs to identify within their own setting what sort of advice may be requested by customers.

Focus page 5

- Use the notes on the focus page as a stimulus for further discussion.
- **Know your products:** Ask learners to identify the sources of information they can use to update their own knowledge in order to respond to customers. Compile a list of sources on the board or flipchart. These may include:
  - training
  - product labels or leaflets
  - on-line information from their organisation
  - product update sheets
  - supervisors or sales people visiting the shop.
- **Listen carefully:** Look at the example for Customer 1. Play the accompanying audio clip through a few times. Ask learners to identify what the customer is asking for. What are the key words or pieces of information that help learners to identify this? How could they clarify with the customer exactly what he wants?
- Look at the example for Customer 2. Listen to the audio clip. Pick out the key requirements for this customer.
- Note that the scripts of these two audio clips are on the focus page for learners to read and identify.
- Give learners more practice at listening to key requirements by working in pairs with either ready-made cards for them to read to each other or ask learners to make up their own requirements. The other partner has to list all the key requirements and repeat these back.
- Emphasise that they must always check with the customer that they have understood their requirements. At the point of sale they should also confirm with the customer that they are happy with the choice they have made. Give examples of what you can say to the customer, for example 'Is it a strimmer you are looking for?'.
- ESOL learners will need further support and examples of things to say to check and confirm information.

Curric. refs	NOS/NVQ	Key Skills
SLlr/L1.1 SLlr/L1.4 SLlr/L1.3 Rt/E3.8	C.3	C1.1

Task 1 6

Listen and identify customer requirements
SLlr/L1.1

- Remind learners that one of the most important aspects about advising customers is to listen carefully and understand their requirements. This means picking out key information from what they say and relating this to your own product knowledge.
- Explain to learners that they will listen to a customer and have to identify the correct product from those shown on the page.
- Play the audio clip through once and allow discussion about the key points.
- Play the clip through again to allow learners to confirm their choice.

If the learner has difficulty

- Help the learner to pick out the key requirements by playing the clips as many times as necessary. List the requirements or features of the product needed. Work through the pictures of products and identify the correct product by a process of elimination.
- Support learners who have reading difficulties so that this does not become a barrier to completing the task.
- ESOL learners may need a lot of supplementary or preparatory work on this, especially regarding the language used for describing objects such as 'you use it for …ing'.

Extension

In pairs learners practise listening to descriptions of products from their own setting and identify the product.

Task 2 7

Identify and confirm the key points from a customer's description
SLlr/L1.1
SLlr/L1.3

- Remind learners that it is often useful to confirm what you have understood by repeating back the requirements to the customer.
- Explain to learners that they will listen to a customer describing what they want. They pick out the best summary on the page.
- Play the audio clip through once and allow discussion about the key points.
- Play the clip through again to allow learners to confirm their choice.

If the learner has difficulty

- If learners have difficulty matching the written summary with the information in the audio clip, help them to list for themselves exactly what this customer requires, before checking the text on the page.
- Allow them to listen as many times as they need to or role-play using the audio script, to allow for thinking time.
- Encourage learners to tick off the features described in the speech-bubbles to see which matches most closely.

Extension

As for Task 1 but ask the listener to confirm what they have heard.

Task 3 8

Listen to a customer's requirements and identify key points
SLlr/L1.1

- Remind learners of the importance of listening to customers carefully in order to identify key requirements.
- Suggest that sometimes it can be useful to list the requirements to remind you what is needed.
- Ask learners to listen to the audio clip carefully. Remind them that they need to pick out key information about what this customer does and does not need.
- Allow time to talk about the scenario and make notes. Play the audio clip again.
- Remind learners that the list or notes they make are for their own use. Accurate spelling and grammar are therefore not critical.
- Play the clip a third time if learners need to confirm their list.

If the learner has difficulty

- Check that the learner understands the requirements of the task. Listen to the audio with the learner and ask direct questions to identify exactly what the customer does or does not want. Help the learner to jot these down.

Extension

Learners discuss with a partner any other relevant questions they may want to ask the customer.

Task 4

Select products that fit the customer requirements
SLlr/L1.1

- Check learner responses to the previous task and discuss any issues that may arise.
- Ask learners to look at the list of options to decide what they would suggest to the customer.
- Emphasise the importance of offering a choice to the customer and that more than one item could be suggested.
- Some learners will need to work on the language of making suggestions and appropriate intonation for delivery.

If the learner has difficulty

Go through the suggestions one at a time and discuss the suitability of each by referring back to the list of requirements.

Extension

- Learners role-play the interaction with this customer, making suggestions that are positive and encourage the customer to buy.
- ESOL learners will need some preparation for this activity such as a model on tape, brainstorming language for suggestions and recommendations, and intonation practice.

Task 5 7

Listen to customer requirements and select the correct product
SLlr/L1.1

- Remind learners of the importance of listening to customers carefully in order to identify key requirements.
- Ask learners to listen to the audio clip carefully. Play it through once for gist.
- Point out the tips and suggest learners note down the main requirements they hear. This can be done as a whole group on the board/flipchart.
- Play the audio clip again to double-check the requirements listed.
- Ask learners to find the two car seats on the catalogue page from the Source material that fit the requirements listed.

If the learner has difficulty

- Check that learners understand the requirements of the task.
- Guide learners to scan the catalogue page for one key word from the flipchart at a time.
- Suggest that they underline the words they find.
- Some learners will need extra support in recognising which two descriptions fit the customer's requirements. It might help to use a process of elimination.

Task 6

Select products from a catalogue to meet customer requirements
Rt/E3.8

- Check that learners have selected the correct items for Task 5.
- Introduce the scenario that the items are not in stock and that they now need to refer to the catalogue to select an alternative car seat.
- Make sure that learners each have a copy of the catalogue page from the Source material.
- Allow learners to listen to the audio clip again and make notes on key features if they wish to.
- Give time for learners to make choices and discuss their selection.
- Encourage able readers to scan through the text for the features they are looking for.

If the learner has difficulty

- It is important that learners have a clear idea of what they are looking for before they begin reading the catalogue items. A list of criteria will help to eliminate products until they have a selection that satisfies all or most of the criteria.
- Learners may need support to interpret the catalogue format.

- Some learners will need support to navigate their way around this task. A systematic step-by-step approach, taking one product at a time, will help with this.

Extension

Ask learners to role-play the way in which the assistant may describe their recommendations to a customer.

Theme assessment

- Learners find out about a product in their own workplace. This might include:
  - what the product is
  - how much it costs
  - where it is situated in the store/workplace
  - what the special features of the product are that could be useful for customers to know.
- Learners present the information either in written form or as a spoken explanation to others. (This will benefit the whole group as they will learn about different products.)

Advising customers

Focus

In order to advise customers, you have to listen to their requirements and understand what they are looking for.

Know your products

Find out as much as you can about the products so that you know what advice to give.

Match products to customer requirements.

Where possible, offer customers a choice of items or an alternative if the one they want is not available.

Listen carefully

If a customer cannot remember the name of the product, focus on the key description words the customer uses.

If a customer wants help to choose a product, listen carefully and pick out the key requirements.

This includes focusing on anything the customer does not want, as well as what they do want.

5

Customer 1
I need one of those thin electric things that you use to cut round the edge of the grass. I can't think for the life of me what it's called.

Customer 2
I'm looking for a tumble dryer to fit under a worktop. I saw a few in your catalogue but I don't know which is best. It has to be a cream colour not white. I need one that takes more than 4 kg and switches itself off automatically as I'm out at work all day.

Check requirements

Check that you have understood the customer's requirements by repeating the information.

Questions

What do you think customer 1 is describing?

Customer 2 wants a tumble dryer. Pick out the customer's key requirements.

Advising customers

Task

Sometimes customers do not know exactly what they are looking for. Sometimes they give you a lot of information. You need to listen carefully and focus on the key words that will help you remember their requirements.

Task 1

6

Listen to the customer describe what he is looking for. Circle the item you think he wants.

a

b

c

d

e

Tips

- Listen for key description words.
- Make a quick note to help you remember details.

Task 2

7

Listen to the customer asking about a car seat. Tick the response that gives the best summary of the customer's requirements.

You're looking for a child's booster car seat that has washable covers and costs about £60?

You're looking for a car seat for an 18-month-old child that has washable covers, turns into a booster seat and costs under £60?

You're looking for a child's car seat and a booster seat that have washable covers and cost less than £60 each?

Tip

Choose the one that repeats the customer's requirements most accurately.

Advising customers

Task

Task 3

8

Listen to the customer asking for advice. Jot down her requirements on the notepad.

Tip

Listen for the key requirements, including what the customer does and does not want.

Task 4

Using your notes above, tick the items that you could suggest the customer might look at.

- gold necklaces
- gold earrings
- silver watches
- gold bracelets
- men's gold watches
- range of brooches
- women's gold dress rings
- silver earrings

Tip

There should be more than one item that matches the requirements.

Advising customers

Task

Where possible, you should offer customers a choice of product to meet their requirements or an alternative if the one they want is not available. For this reason, you will need to know or find out about the products.

For these tasks you will be using the Baby and toddler car seats catalogue page from the Source material.

Task 5

7

Listen to the customer and look at the information from the catalogue page. Tick the two seats that fit his requirements.

1 Easy-carry car seat

2 Portable car seat

3 Deluxe car seat

4 Economy car seat

5 Comfort-care car seat

6 Two seat plus

Tips

- Listen for key description words.
- Make quick notes to help you remember details.
- Match the key requirements with the written descriptions from the catalogue.

Task 6

The two seats that fit the customer's requirements are not in stock. The customer does not want to wait for an order. Use the catalogue information page again to find a possible alternative seat for him.

Which seat meets all the requirements except one?

_____.

Tip

You could list the requirements to check against the catalogue descriptions.

PAGES 1:17–1:18

Dealing with complaints

Occupational setting

Resolving customer service problems can be difficult if staff are not confident in communicating with others or do not know the correct policies and procedures that should be followed. Many learners will understand the theory of communicating well but need concrete examples of how to respond in different circumstances. Some retail outlets will have prescribed mechanisms in place and these should be reflected in the teaching if they are known. This focus reflects Unit D3 of the National Occupational Standards.

Materials

Staff training video if available

Audio equipment

Role-play cards from the Source material (0:03)

Learning outcomes

To identify and understand effective ways to deal with customer complaints (focus page, Task 1)

Introduction

- If available, play a clip from a staff training video to highlight some of the key issues around dealing with complaints.
- As a group discuss the issues and problems that learners have experienced when dealing with complaints or when trying to resolve difficult situations at work. Key issues will include:
  - identifying the problem
  - keeping the situation under control
  - knowing what to do if customers are angry or aggressive
  - knowing what you are able to offer the customer
  - knowing when to involve your team leader or manager.
- List the issues on the board and ask learners to discuss the solutions to these in pairs, based on either their own experience or knowledge of their own company guidelines and training. (If there are a lot of issues, then these can be divided between several pairs.)
- Feed back the solutions to the group and invite discussion. Ask the learners 'What if …' and present them with non-routine situations. Emphasise the fact that they must be clear in their minds how they will behave in these situations, so that they are not just reacting to the customer spontaneously.
- Ask learners how they will know if they have been successful in dealing with the customer and what the consequences could be if the situation is not resolved satisfactorily.

Focus page 9

- Reinforce the point that dealing with complaints entails both understanding company policy and being able to communicate within these guidelines effectively and with confidence.
- Go through the 'dos' and 'don'ts' on the page and ask learners to contribute examples and experiences of their own that reinforce these points. In particular:
  - make sure learners are given examples of how you can express your concern, for example by saying sorry or empathising
  - give examples of greetings using informal language such as 'whatcha mate' in order to explain the meaning of informal language
  - emphasise the importance of letting the customer finish the complaint without interrupting
  - make sure learners understand how to acknowledge other people's anger.
- Point out that a listener can use both visual and verbal signals to show that they understand or empathise, or that they are not interested.
- Emphasise that it is important to acknowledge the customer's feelings – such as anger – and not to mirror the emotion as this can make the situation worse.
- Make sure learners understand what is meant by open body language and negative body language. Demonstrate or ask learners to demonstrate strategies they have for indicating that they are interested/not interested, listening/not listening, etc. Also check that learners understand the consequences of copying aggressive body language.

- Play the audio clip, ask learners to listen carefully to the interaction. Discuss the scenario with the group with reference to the dos and don'ts listed on the focus page.
- Listen again and ask learners to think about the lists as they listen. They can mark off or highlight any aspects of good or bad practice that they identify. Check learners' responses as a group then listen to the clip once more, pausing to identify any aspects missed by learners or that you want to reinforce.
- Think about ways that the assistant could have got round the problem of the lost receipt, for example, by checking if the customer paid by credit card – in which case the credit card record would be available.

Curric. refs	NOS/NVQ	Key Skills
SLlr/L2.1	D.3	C2.1a
SLlr/L1.1		
SLlr/L1.3		
SLlr/L1.4		
SLlr/L1.5		
SLlr/L1.6		
SLc/L1.1		
SLc/L1.2		
SLc/L1.3		
SLc/L1.4		

Task 1

Role-play a customer complaint scenario
SLlr/L1.1
SLlr/L1.3
SLlr/L1.4
SLlr/L1.5
SLlr/L1.6
SLc/L1.1
SLc/L1.2
SLc/L1.3
SLc/L1.4

- Remind learners of the complaint they have already listened to.
- Introduce the idea of a role-play. Give out role-play cards. There are examples in the Source material but the more cards you have the greater the range of combinations that can be achieved. You prefer to make similar cards that relate to a different retail setting or a range of settings appropriate to the learners' workplaces.
- Support learners throughout, especially those who are not used to role-play. In most role-play situations there is one role that is more straightforward because it is responsive. Offer this role to less confident learners to start off with. Check at step 3 that learners are clear about their chosen situation.
- Make sure learners understand that they should think carefully about their role before they start and put themselves in the situation of the person they are playing. Ask learners to consider as assistants whether they will try to deal with the situation correctly or play the 'bad' assistant. As customers, learners can decide to take a confused role, an aggressive approach or to be quite straightforward and clear.
- Ask observers to use the Do's and Don'ts checklists from the focus page to help them evaluate the interaction. You may want to make this into a checklist for learners to use during the observation.
- Allow learners time to complete the role-play and discuss it as small groups before taking feedback from the group.

If the learner has difficulty

- Some learners find role-play difficult; however, many people in retail are natural communicators and will not have a problem with this.
- Pair learners having difficulty with a supportive partner who can lead the role-play effectively. It may be necessary to provide support by intervening and talking about appropriate responses.
- Some learners will benefit from talking through their role first so that they are clear about how to react.
- ESOL learners would benefit from evaluating the effectiveness of the language they used so that they know how a good or bad effect was achieved.

Extension

- Repeat this kind of role-play with a range of different scenarios, set by you. Learners should be prepared to analyse personal performance as well as that of other participants.

Theme assessment

- Learners should find out from their own workplace policies and procedures how the issues raised in the session should be dealt with.
- Learners can develop a checklist of performance and use it to score their own workplace performance.

Dealing with complaints

Focus

You are likely to have to deal with complaints from time to time. Your workplace will have procedures for dealing with specific customer complaints, but there are things that you can do in any situation to stop it getting out of hand.

Do	Don't
• Look at the customer • Use open body language • Listen carefully • Stay calm • Be polite • Find out and use the customer's name • Repeat the problem back to show you are listening and understand • Express your concern • Thank the customer for bringing it to your attention • Explain exactly what you are going to do about it	• Turn away • Carry on or start doing something else • Use negative body language • Copy the customer's body language • Argue with the customer • Shout • Be rude or sarcastic • Use informal language • Make excuses • Say you are going to do something then not do it • Keep the customer waiting • Interrupt the customer

9

Listen to the customer complaining to the sales assistant. Discuss how well the assistant handles the situation.

Dealing with complaints

Task

Task 1

Act it out!

Use the Role-play cards from the Source material to act out a scene in which a customer comes into a shop to complain.

Here is what you need to do:

1 Work in groups of three. Decide who will be the customer, who will be the assistant and who will observe and make notes.

2 Use the customer and assistant cards for information about the characters. Decide how the characters are going to behave and the sort of things they might say.

3 Decide on the situation – what is the complaint about? You can use your imagination or think of a situation you have come across in real life.

4 Once you have got your idea, act it out without rehearsing it. (This makes it more like real life as you have to react to others on the spot. Use your experience and knowledge of these situations.)

5 The person who is observing should watch the scene and note down what the assistant is doing from the 'do' and 'don't' lists on the focus page.

6 When you have finished acting out the scene, discuss it as a group. You can use the questions below to start you off.

CUSTOMER CARD 1

This is the first time you have complained about anything and you are feeling quite embarrassed about it. You don't want to cause a scene, but you don't want to be walked over either!

ASSISTANT CARD 1

You are having some personal problems at home and things are very stressful. On top of this you have had a busy day and you are feeling quite ill. The last thing you need is a complaining customer!

CUSTOMER CARD 2

You often have to make complaints in this shop about the goods and the service. This latest problem has really annoyed you and you are not going to take any more!

ASSISTANT CARD 2

The policy in your store is that the service assistant should deal with complaints and not involve managers unless it is essential. Can you satisfy the customer without involving the manager?

Discussion questions

- What did the assistant do correctly or particularly well?
- What would need to be changed and why?
- How could this situation be improved?
- Did the customer go away satisfied?

Remember!

Dealing with complaints effectively makes the experience more pleasant for the customer and for you.

Practise the speaking and listening skills you need for dealing with complaints.

SLlr/L1.1; SLlr/L1.3; SLlr/L1.4; SLlr/L1.5; SLlr/L1.6; SLc/L1.1; SLc/L1.2; SLc/L1.3 SLc/L1.4

PAGES 1:19–1:20

Promoting services

Occupational setting

Promoting services or products is an essential part of sales. Sales assistants who have developed these skills are highly valued within the retail trade. Promoting services and goods requires excellent communication skills in order to understand customer requirements and to communicate product knowledge in a way that suits the customer best. This focus relates to Units C12 and C4 of the Occupational Standards.

Materials

Drawing paper

Customer leaflets for two different services provided by the company

SAVECARD customer loyalty card scheme from the Source material (0:04)

Learning outcomes

1 To give information in a clear way to help the customer follow it (focus page, Tasks 2 and 3)

2 To give information to customers that is up-to-date, accurate and factual (focus page, Task 1)

3 To promote services in a positive way (focus page, Tasks 2 and 3)

Introduction

- Explain that this first activity requires some people to draw, but that the drawing only needs to be very simple – it doesn't have to be 'good'. Ask learners to sit back-to-back in pairs. Give one person in each pair a simple picture of an everyday object. This person has to describe how to draw the object to their partner but without using the name of the object or giving any really obvious clues, such as its use. The other person has to draw the item in pencil only and is not allowed to respond verbally in any way.
- Once the task is completed, discuss with the people doing the drawing what was difficult about following the information they were given. Prompt learners to consider how far their understanding was affected by:
  - the amount of information given
  - the order the information was given in
  - how clearly the information was given (regarding vocal delivery)
  - how accurate the information was (the drawings might reflect this to some extent!).
- Ask the people giving the information to talk about their difficulties with passing on the information. They might consider the difficulty of describing the object precisely enough and of knowing whether the other person needed more time between each description or had not understood something.
- Ask everyone whether they mentioned things like colour (although it was a black and white drawing). Did this sort of information help the drawer to picture the object better?
- Summarise some key points that the activity highlighted about passing on information. Emphasise that it can be difficult to be clear and accurate but that this helps other people's understanding. Highlight the fact that communication is a two-way process and that it is easier if you can see the other person's reaction.
- In small groups, give learners a customer leaflet about a service provided by the company. Ask them to read it and list the things that they think are key selling points (benefits) for the customer, for example, it might be free or save time, etc.
- Discuss their findings and make a fuller list on the board. Talk about the importance of the key selling points for giving the customer a positive impression of the service. The key thing here is how the service can benefit customers.

Focus page

- Link the introductory activities and the focus page by giving a summary of the key points when promoting services or products of giving clear, accurate information to customers in a positive way but without being pushy.

- Talk through the points in blue boxes one by one, getting learners to think of examples specific to their place of work, where appropriate. Explain any unfamiliar words and give examples, such as jargon.
- Discuss the sorts of circumstances that require learners to adapt their language, for example, some customers may already know quite a lot about a service whereas others will know nothing.
- Emphasise the importance of giving facts. Remind learners about trading standards and consumer protection.
- Write on the board the two headings 'Give accurate information' and 'Speak in a clear and accurate way'. Ask learners to decide which bullet points in the focus page are mainly about speaking clearly and positively and which are about being accurate. Write these on the board under the appropriate headings.
- Note: you may prefer to give learners copies of the focus page to cut up into individual points that they can physically place below the two main headings or categories.
- Ask learners to think of any further details that came out of the introductory activities. Add these to the lists on the board.
- Give groups of three learners a different customer service leaflet. Each group is to give a brief presentation to promote the service. The rest of the group must evaluate this in terms of clarity, accuracy and promotional value. A vote can be cast to see which product has been promoted the best.

Curric. refs	NOS/NVQ	Key Skills
SLc/L1.1	C.12	
SLc/L1.3		
SLc/L1.4		
Rt/L1.1		

Task 1

Find out about a service in order to answer questions accurately
Rt/L1.1
SLc/L1.3
SLc/L1.4

- This task requires the information on the SAVECARD Customer Loyalty Card Scheme from the Source material.
- Because of the reading level of this task, you could act as a trainer first to explain the scheme before learners do the activity. This will help learners to approach the reading with some prior understanding.
- Explain to learners that the idea of the task is to use written information to find out about a loyalty scheme in order to be able to answer the sort of questions customers might ask about it.
- Explain to learners that they will need to use just the information in the leaflet to answer the questions. They should note down their answers for discussion afterwards. Remind learners to put answers in their own words where possible.
- Note: this can be done in pairs as an oral exercise instead, learners asking each other the questions as if they are the customer asking about the service. For example, the first question would be 'What is the benefit of this scheme for me?' The 'assistant' should answer the questions as if speaking directly to the customer.

If the learner has difficulty

- Learners may have difficulty with the reading aspect of this task and will need support to extract the key information from the text. It may help to use a highlighter pen.
- A lot of product knowledge can be gained through reading. Learners who are struggling with this skill will need some additional support to build their confidence and develop their reading strategies. Making brief notes or jotting down keywords may be a good memory aid for some learners.
- Learners may also have difficulty with individual words within the text. Encourage learners to use the product glossary and to make a note of words they will need, together with definitions written in their own words that they can understand.
- If you are concerned about the reading level, this activity can be done as a whole group or in small groups instead, with each group finding the answer to one of the questions, then pooling answers.

Extension

Ask learners to find out details about a similar service (e.g. a loyalty scheme) in their own workplace. They should make notes on the service so that they know all about it.

Task 2 10

Recognise clear and positive explanations
SLc/L1.1
SLc/L1.3

- Remind learners about the points on the focus page about giving clear information.
- Explain to learners that they will listen to three assistants once and put down their general impression of who was the clearest. Then they will have a chance to listen again.
- Play the audio again so learners can check they are happy with their choice.

If the learner has difficulty

Listen to each clip individually with the learner and ask direct questions about the clarity and accuracy of the information given. Ask the learner to repeat back what they have learnt after each clip.

Extension

Ask the learners to listen to assistant 3 again (the one who gives the best information) and tick the bullet points on the focus page that she does correctly.

Task 3

Recognise what makes some explanations unclear
SLc/L1.1
SLc/L1.3

- Remind learners again of the points from the focus page about giving clear information.
- Explain that they are going to listen to the audio clips again but this time they should concentrate on the ones they did not pick so that they can work out why the explanations were not clear.
- Encourage learners to use their lists from the focus page to help them decide what the other two assistants are doing incorrectly.
- Discuss this in pairs then as a whole group.

If the learner has difficulty

- Listen to each clip individually with the learner and ask direct questions about what seems clear or unclear to them. Help the learner to identify what aspects of the clip make it easier to follow. Is it the words used, the order information is given or the amount of information?
- ESOL learners will benefit from putting the same information in words, but using the good example from the audio material as a model to try to achieve the same standard.

Extension

Ask learners to practise explaining the loyalty card scheme to each other with a third person listening to the explanations and giving feedback.

Theme assessment

Ask learners to prepare a short speech to 'sell' the service they researched in the task 1 extension activity to the rest of the group. Remind learners that the information they give must be accurate. Learners can decide which service wins their vote.

Promoting services

Focus

When you promote services such as loyalty schemes to customers, you need to make sure you:

- give accurate information
- speak in a clear and positive way.

Know exactly what a customer needs to do to join schemes.

Don't use jargon or complicated words where simpler ones will do.

Have a good understanding of what the service is about and how it works.

Make sure you are up-to-date with the details of the service.

Adapt language to suit each customer and situation.

Speak confidently.

Give accurate information

Speak in a clear and positive way

Don't mumble or hesitate.

Use words that make the service sound worthwhile.

Give information in a logical order.

Keep information simple by not adding unnecessary detail.

Repeat anything that the customer has not understood.

Smile and be polite at all times.

Give the facts.

Discuss whether the advice in boxes helps you to:

- give accurate information

OR

- speak in a clear and positive way.

Tip

Some of them might help you to do both of these things.

Promoting services

Task

To give accurate information, you need to know about the service or product.

Task 1

Read the information about the SAVECARD customer loyalty card scheme from the Source material.

1 What is the benefit of the scheme for customers?
2 When do customers receive vouchers?
3 How does a new customer join the scheme?
4 If a card is lost what should the customer do?
5 Where can you find out more information about the scheme?
6 How do customers get a card when they first join?

Tips

- Read the information carefully.
- Look up any unfamiliar words.
- Put the information in your own words.

Remember!

Make information clear and accurate.

Give details in a logical order.

Task 2

10

Listen to these assistants explaining the loyalty card scheme to a customer. Which assistant gives the best explanation?

1

2

3

Task 3

Discuss what is wrong with the way the other two assistants explain the scheme.

Tip

Choose the assistant who makes the information easiest to follow.

PAGES 1:21–1:22

Dealing with returned goods

Occupational setting

Customer-facing assistants in retail often have to deal with returned goods and exchange situations. They must follow company procedure to ensure that they are operating within the law and also to the benefit of both the customer and the company they represent. Company guidelines will be taught as part of induction training and will also be provided in writing. Shop assistants may need to make judgements about the action they should take based on the information they receive from the customer and a sound knowledge of the company procedures. This focus reflects Unit B12 of the Occupational Standards.

Materials

Audio equipment

Refunds and exchanges policy from the Source material (0:05)

Customer returns information from the Source material (0:06)

Information or access to information about legislation related to returning goods, refund or exchange

Useful websites:
www.dti.gov.uk/ccp/topic/facts/salegoodsact.htm
www.tradingstandards.gov.uk
www.citizensadvice.org.uk

Learning outcomes

1 To understand the need to follow guidelines and procedures to process returns (focus page, Task 3)

2 To practise reading strategies to understand and interpret information (focus page, Tasks 1–3)

Introduction

- Ask learners to give reasons why customers return goods, or to think of reasons why they have needed to do this in the past. Discuss as a group the way in which these returns may be dealt with.
- Ask how they know how to deal with particular types of returns. If necessary, lead the discussion to include reference to following company procedures or guidelines and some reference to the laws relating to customer rights.
- Ask learners to search for more information about the sale and supply of goods on the Internet or in their reference library. Most website information will give the facts from the consumer's point of view. This gives learners the opportunity to interpret the information from their own viewpoint as retailers. The key points from this research should be fed back to the group. This may be an opportunity for learners who are undertaking Key Skills qualifications to give a presentation of their findings.
- Learners who have difficulty with the reading aspect of this task may need to be supported by emphasising different reading strategies: skimming to find the correct source of information, scanning to locate information and then detailed reading to make sure they have understood.

Focus page

- Remind learners that they must comply with legislation when deciding how to deal with returns or exchanges. They must also know the procedures outlined by their own organisation.
- Ask learners if they know the procedures to be followed. Have they learnt this during training? Do they know where to find this information if they need it? Ask learners to make sure they can track this down in their own place of work.
- In many instances, assistants will be making routine decisions about returns: whether to accept them, whether to give full refund or credit notes, etc. Most retail outlets have guidelines to be followed. Ask learners if they have experienced situations where they found it difficult to make up their own minds in spite of following these procedures. Give examples if necessary for learners to discuss. In these cases they may need to refer the problem to another person or look again at their own policies.

- Having made a decision about the refund, is there any further work to be completed? Ask each learner to list other procedures or jobs that must be done once an exchange or refund is given. This may include completing a credit note (How is this done? Manually or on a computer?), returning the goods into stock, returning the goods to a supplier, etc.
- The fundamental issue about the returns process is that learners must follow legal and organisational guidelines. Different stores will have different procedures and each learner must familiarise themselves with these.

Curric. refs	NOS/NVQ	Key Skills
Rt/L1.1	B.12	C1.2
Rt/L1.4		C2.2
Rt/L1.5		
Rt/L2.2		
SLlr/L1.1		

Task 1 11

Find out the purpose of a return and read to find out what action to take
SLlr/L1.1
Rt/L1.1

- Explain to learners that for practice they will be using policies and procedures from the Source material, rather than their own. Emphasise the importance of reading and following their own procedures at work.
- Make sure each learner has a copy of the Refunds and exchanges policy from the Source material. Explain that they might need to read the document in detail on this occasion to work out how to deal with the return.
- Play the audio clip through once for learners to get the gist of the customer's needs. Discuss any issues with the group.
- Play the audio clip again for learners to respond to the questions.
- If necessary play the audio a third time for learners to confirm their answers.
- The answer to the final question is clear from the text; however learners may want to discuss other actions.

If the learner has difficulty

- It is important that learners listen carefully first to the refund scenario and are clear what is being returned and why. Learners must then read the guidelines with equal care and attention to detail to decide on the action that can be taken here. It will help some learners to ask direct questions based on the text and the scenario. Does the customer have a receipt? Is the returned product in mint condition?
- There are key words relating to retail that will occur again and again, such as 'exchange', 'redeem', 'receipt' and 'debit'. It is well worth highlighting these words with learners and encouraging them to use them as much as possible.
- Learners who have difficulty with reading text at this level may need additional support to improve their confidence with reading. This may include paired reading and questioning to encourage comprehension.
- ESOL learners may have difficulty interpreting the phrase 'in mint condition'.

Extension

Ask learners to find out who is ultimately responsible in their place of work for making decisions on refunds and exchanges. They should also find out from their own work procedures what they should do if a customer wants money back on an item that suffered damage after it left the shop.

Task 2

Read and extract information from a returns procedure
Rt/L1.1
Rt/L1.4
Rt/L1.5

- Explain to learners that they will be using the Customer returns information from the Source material.
- Remind learners to use the strategies for finding information quickly – as shown at the top of the task page and practised in the introduction.
- Go through the first question as a group to demonstrate locating the information using key words ('ordered', 'especially').

If the learner has difficulty

- Learners may be overwhelmed by the quantity of text they need to use for this task. Support them to use scanning strategies to find the text they need in order to answer the questions. Emphasise that they do not need to read all of the text.
- Make sure learners can interpret words that may be unfamiliar to them but are important to retail, such as 'warranty' and 'consumables'.

Extension

Ask learners to find out the procedure in their own place of work if a customer wants to return an item that was ordered especially for him.

Task 3 12

Respond to a customer's complaint regarding a returned item
Rt/L1.1
Rt/L1.4
Rt/L1.5
SLlr/L1.1

- Remind learners of the importance of following procedures in order to process returns and not to be influenced by customer behaviour.
- Ask them to listen to the customer and make sure they are clear about his complaint.
- Direct learners to Refunds and exchanges policy and Customer returns information in the Source material and ask them to discuss in pairs what they would do for this customer.
- Report this back to the group and discuss any disagreements. Refer to the guidelines in both the Source material documents and highlight the relevant information.
- Listen to the audio clip again if necessary.

If the learner has difficulty

- Check first that the learner understands the scenario presented by the audio clip. Try to relate this to a situation in their own workplace – this will make the situation more concrete.
- Some learners will need support to read the documents and to extract the relevant information. A highlighter pen will be useful here.
- Encourage learners to establish effective reading strategies. Scanning information is good but there is still a need to read carefully and interpret what they have read. Some learners may need support and practice in order to be confident with reading at this level.
- ESOL learners should also discuss how to respond to this customer and practise doing so.

Extension

Ask learners to find out what the procedure is in their place of work if a customer wants to return damaged goods after a month.

Theme assessment

- Ask learners to find out the following information on exchanges:
  - what they should do if a customer wants to exchange an item that has been used
  - the procedure in their own place of work if a customer wants to exchange an item that was ordered especially for them
  - what the procedure is in their place of work if a customer wants to exchange goods after a month.

Dealing with returned goods

Focus

The customer has legal rights regarding replacements and refunds.

What are they?

What are the rights of the shop?

SALE AND SUPPLY OF GOODS TO CONSUMERS REGULATIONS 2002

SUPPLY OF GOODS AND SERVICES ACT 1982

SALE AND SUPPLY OF GOODS ACT 1994

SALE OF GOODS ACT 1979

Jones and Sons

REFUNDS AND EXCHANGES POLICY

1. A refund or exchange will be given for any item that is brought back:
   - in mint condition
   - with a receipt.
2. A credit note should be issued if the customer does not have a receipt and does not wish to exchange the item for another product.
3. Credit notes can only be redeemed for their face value; no change can be given.
4. You are legally obliged to give a refund if the product is faulty, even if the customer does not have a receipt, provided it was bought from one of our stores.
5. Whenever a customer brings back for refund an item that was originally bought using a credit/debit card, the refund

A shop is not required by law to take back goods if the customer changes his or her mind about buying them.

What is the policy of your organisation about refunds and exchanges?

When can you decide for yourself what should be done?

When should you ask somebody else?

Who should you ask?

Is there any paperwork to do?

Dealing with returned goods

Task

When you are looking for information in long pieces of text, make it easier for yourself by:

- using the headings and subheadings to find just the part of the text that you want to read
- looking for key words to find the part of the text that you need
- only reading the part that has the information you need.

Task 1

11

Listen to the customer returning a purchase.

1 What is the customer returning? Why?

Use the Refunds and exchanges policy from the Source material.

2 Would you give the customer a refund, an exchange or would you issue a credit note?

Task 2

Use the Customer returns information from the Source material.

1 Can a customer return an item that was especially ordered for him or her?

2 Name three items that must be returned unused and sealed if a refund is required.

3 What three questions might you ask a customer who is bringing back a mobile phone?

4 What is the minimum guarantee time on non-consumable products?

5 Name three products that come under hygiene regulations.

Task 3

12

Listen to another customer returning a purchase.

Use the Refunds and exchanges policy and Customer returns information from the Source material to decide what you would do in this situation. Discuss this with a partner.

Listen to customers who want an exchange and use manuals to help decide what to do.

SLlr/L1.1; Rt/L1.1; Rt/L1.4; Rt/L1.5

Check it

1 The Occupational Standards say you should respond promptly and positively to your customers' questions and comments.

Which of these is a positive response to the customer's question?

A No we don't. Sorry.

B I'll just check for you. They've been very popular.

C I'd say it's unlikely. They were snapped up quickly because they're so cheap.

D I could look but I don't hold out much hope. **SLlr/L1.6; SLc/L1.1**

2 Which of these would be the best way to help a customer who is having problems pushing a faulty trolley full of shopping?

A Suggest that the customer gets a different trolley.

B Offer to try and mend the trolley.

C Ask whether the customer needs some help pushing the trolley.

D Offer to help transfer the shopping to another trolley. **SLlr/L1.5**

3 Which of these is an example of positive body language when talking to customers?

A Shaking your head

B Making eye contact

C Folding your arms

D Shrugging **SLlr/L1.3**

4 Which of these is an example of formal language that is suitable to use with customers?

A What can I do you for then?

B What do you want?

C Can I help you?

D Give us a shout when you want a hand. **SLc/L1.1; SLc/L1.2**

5 Which of these would be appropriate when answering the telephone to a customer?

A Yes? Who's calling?

B Hello. Who do you want and why?

C Good morning. Jennie Sarah Birch speaking. Waterford's store. The store that gives the customer more. How may I be of assistance?

D Good morning. Waterford's Store. How can I help you? **SLc/L1.1; SLc/L1.2**

A Take the second turn off this roundabout and you'll see the store directly ahead of you.

B Then take the first right which takes you past Burnford School.

C First you need to turn left out of the car park.

D You will come to a roundabout at the end of the school road.

6 Which is the correct order for these instructions?

A C, A, B, D

B B, C, A, D

C C, B, D, A

D D, A, B, C **SLc/L1.4**

7 What is the customer describing?

A A soothing foot cream

B Bath salts

C A pair of slippers

D A foot bath **SLlr/L1.1**

I'm after one of those things. You know, to put your feet into. You have to put water in and it can go bubbly. What's it called?

8 Which of these gives the clearest information to the customer?

A 'The red light goes out when the cooker has heated up to the right temperature.'

B 'When the temperature has been achieved, the luminous light on the control panel display signals this.'

C 'The flashing thing stops when it's got there.'

D 'You have to keep checking because it has this sort of coloured light that flickers a bit then goes out, but only when it's at say 200 degrees.' **SLc/L1.3**

9 Look at the Refunds and exchanges policy from the Source material (0:05). Which of these statements is true?

A Customer has to provide a receipt for a faulty item to be exchanged even if it has been bought from one of our stores.

B Customer can have a cash refund for an item bought by credit card.

C Customer cannot be given a refund in cash or vouchers for an item purchased by credit card.

D Customer can be given change when using a credit note. **Rt/L1.5**

10 What does 'mint condition' mean?

A Good as new

B Faulty

C Has a hole in it

D Within a month **Rs/L1.1; Rw/L1.2**

Audio

PAGE 1:6

Responding to customers

Task 1 1

a Watcha. D'you wanna hand?

b Good morning. Would you like any help?

c Hello. Are you looking for something in particular?

d I've been told I've got to help you.

e Hello. Can I help you?

f Please do not hesitate to inform me if you require any assistance.

PAGE 1:10

Speaking and listening to customers on the phone

Task 1 2

Assistant: Good morning. This is Mandy speaking. How may I help you?

Customer: Can you tell me whether I can hire some glasses for a Christmas party?

Assistant: Certainly sir. What date would you require them?

Customer: The party is on December 22nd.

Assistant: I'll just check in the diary. (pause) Yes that should be fine. How many glasses do you need?

Customer: There'll be about 40 guests.

Assistant: We offer pint glasses, wine glasses and tumblers. Which would be best for you?

Customer: Well I suppose about half the guests will drink beer and the rest wine so I'd better have 20 pint glasses and 20 wine glasses.

Assistant: Our glasses are packed in crates of 24, so if I order you a crate of each that will give you a few extra. Is that OK?

Customer: Fine. When can I pick them up?

Assistant: You can collect them at any time after 9 am on December the 22nd and you must return them by 9 am on December the 23rd.

Customer: OK.

Assistant: Can I offer you any help with choosing wine or beer for your party? Or maybe you could take advantage of our buffet selection from the delicatessen?

Customer: No. I've got everything sorted thanks.

Assistant: Fine. Just give us a ring if you change your mind. So I'll order you 24 pint glasses and 24 wine glasses to be picked up on December the 22nd. Is that right?

Customer: Yep.

Assistant: What name shall I book them in?

Customer: Adams.

Assistant: Good. So that's 24 pint glasses and 24 wine glasses to be picked up on December the 22nd and returned on the 23rd Mr Adams.

Customer: That's right. Thank you.

Assistant: Is there anything else I can help you with?

Customer: No that's all.

Assistant: We'll see you on December the 22nd then. Goodbye and thank you for calling.

Customer: 'Bye.

Task 5 3

1 Hello. Samco Store. This is Darren speaking. How may I help you?

2 Hello er er Samco Store. This is er Darren er speaking. Er How may I er help you?

3 Hello. Samco Store. This is Darren speaking. How may I help you?

4 Hello this is Darren speaking. How may I help you?

5 How may I help you? Oh oh I should have said Hello this is Darren speaking from Samco Store.

6 Yep. Samco. What d'yer want?

Task 6 4

Hello is that the clothing department? I'm in such a flurry! Would you believe that my daughter has just told me she's getting married in a fortnight's time! You'd think she'd give us more notice but that's how the young do things these days. Anyway I'm going to need a complete outfit and I'm hoping you have got a personal shopper who can help me get

everything I need and make sure it all matches. My daughter will be wearing cream so I thought maybe lilac. What do you think? I'll need a hat of course and shoes, a smart suit and oh yes a handbag. It's July so I don't think I'll need a coat. Anyway if it rains there will be an umbrella in the car. Do I need to make an appointment with the personal shopper? Now I've got to think what to give them for a present. They say they don't need anything but I want to mark the occasion somehow. I'll get it at the same time as the outfit.

PAGE 1:13

Advising customers

Focus page 5

Customer 1: I need one of those thin electric things that you use to cut round the edges of the grass with. I can't think for the life of me what it's called.
Customer 2: I'm looking for a tumble dryer to fit under a worktop. I saw a few in your catalogue but I don't know which is best. It has to be a cream colour not white. I need one that takes more than 4 kg and switches itself off automatically as I'm out at work all day.

Task 1 6

I'm looking for one of those heated things that women use to curl their hair. My wife said you sold them. It's not a hairdryer. It's like a brush thing that hasn't got to be plugged in at all.

Tasks 2 and 5 7

I'd like a car seat for an 18-month-old child. It must have washable covers. I've heard you can get one that turns into a booster seat for older children, which would be ideal, but I don't want to spend more than £60.

Task 3 8

I'm looking for a piece of jewellery for a female as a birthday present but I don't want a necklace. Trouble is, she's allergic to any metal other than gold if it's next to her skin and she doesn't wear earrings. Have you got any suggestions?

PAGE 1:17

Dealing with complaints

Focus page 9

Customer: I bought this jacket yesterday and there's a flaw in the sleeve. Look.

Assistant: Sorry. Just one second. Sarina, can you tell Marie I'm back off my break? (quieter) Where's the pen? Ah. Right. Sorry. You were saying?

Customer: This jacket's got a flaw in the sleeve.

Assistant: When did you buy it?

Customer: Yesterday.

Assistant: Can I have a look at it? Actually, this isn't exactly a flaw.

Customer: What do you mean?

Assistant: The wool has just got a bit unravelled.

Customer: That's what I mean. That's a flaw.

Assistant: Well. Would you like to exchange it for another jacket?

Customer: No. I want my money back.

Assistant: Certainly. Do you have the receipt please?

Customer: Oh gosh no, I don't. I threw it away.

Assistant: Right. Well unfortunately we can't give refunds on damaged goods without proof of purchase.

Customer: What?

Assistant: What I can do is give you vouchers worth the same amount of money. You can spend them in the store at any time.

Customer: I'd prefer my money back.

Assistant: I'm sorry. That sort of decision's out of my hands.

Customer: I want to see the manager then.

Assistant: She's out of the office this morning. Can you call back later?

Customer: No, I'm on my way home. I'm not coming in again.

Assistant: Would it be convenient for the manager to ring you at home as soon as she comes in?

Customer: Yes. I'd like to speak to her.

Assistant: Will you be in all afternoon? She might not be back until after 4 o'clock.

Customer: Fine. I'll be there up to 5 o'clock.

Assistant: Can I just have your name and number, please?

Customer: Mrs Preece. 01876 109032.

Assistant: Right. Can I just check I've got these details correct, Mrs Preece? You bought this jacket yesterday but no longer have the receipt. You would like your money back. You will be at home this afternoon up to 5 o'clock on 01876 109032.

Customer: Yes.

Assistant: I'll make sure the message is passed on to Jane, our manager. Thank you, Mrs Preece.

PAGE 1:20

Promoting services

Task 2 10

Audio 1: It's a sort of card you use when you shop to get things like points which you sort of save up, but not quite like money. It can lead to things like vouchers so it makes your bill less in the end.

Audio 2: It's an electronic card which is swiped through at the EPOS when you make a transaction and accumulates points which are then translated into the money off voucher scheme.

Audio 3: It's a free card that gives you one point for every £1 you spend on your shopping. You will be sent vouchers every 3 months, which you hand in at the till to help you save money on your shopping bill.

PAGE 1:22

Dealing with returned goods

Task 1 11

Hello. I bought this cardigan last week but when I tried it on at home my friend said the colour didn't suit me. Could I exchange it for a different colour? I've got the receipt.

Task 3 12

This is ridiculous! You buy something in good faith and it breaks the first time you use it. I bought this here just over a month ago as a birthday present for my wife and it's broken already. Look, this has fallen off and this bit looks a bit dodgy. What are you going to do about it?

Answers

PAGES 1:3–1:4

Recognising customer needs

Focus page

Picture 2: The customer is looking confused. She may not be able to find what she needs, may be having problems following the information on the labels, or may be unsure about the sizes of the clothes. You could ask the customer if she is looking for anything in particular, or simply let her know that you are available if she needs any help.

Task 1

Picture 1
The problem might be that the customer needs to go up to the next floor but cannot use the escalator.

You can tell because the customer is looking up the escalator as if he wants to go up, but is looking confused.

You could ask the customer first if he needs any help. You could show or direct him to the lift if he does want to go up to the next floor.

Picture 2
The problem seems to be that the customer can't reach a product from the top shelf.

You can tell because the customer is stretching up on tiptoes and looks angry/annoyed.

You could ask the customer if she would like help reaching the product down, but be careful how you put this, as the customer might take offence if she thinks you are suggesting she is too short. It would not be appropriate to make a negative comment about the height of the shelves!

Picture 3
The problem is that the customer is trying to cope with a pushchair and a trolley in a narrow aisle. You can tell from the situation itself and from the expression on the customer's face, which shows she is getting upset.

To avoid upsetting the customer any further, it might be best to ask her if there is anything you can do to help, rather than offering a particular type of help.

PAGES 1:5–1:8

Responding to customers

Task 1

Assistants **b**, **c** and **e** speak in an appropriate way.

Assistants **a**, **d** and **f** do not speak in an appropriate way.

Task 2

1. Assistant **a** uses very informal language. This is not at all suitable.
2. Assistant **f** uses formal language that sounds mechanical, as if the assistant is saying lines they have learnt, rather than really wanting to help.
3. Assistant **d** sounds the least caring because he says that he's been ordered to help, rather than actually wanting to.
4. Assistant **b** has the best approach: the language is not too formal or informal, and the offer of help sounds genuine but the customer has a choice.

Assistant **c** is polite and offers particular help to the customer. However, the customer might just be browsing and this approach could put the customer off. Assistant **e** is also polite and the offer of help sounds genuine, but the approach is a little abrupt.

Task 3

Solution **a** matches situation **1**.

Solution **d** matches situation **2**.

Solution **h** matches situation **3**.

Solution **e** matches situation **4**.

Solutions **c** and **f** match situation **5**.

Task 4

You may have written this sort of information.

Trainee	Positive body language/response	Negative body language/response
Rufikat	Made eye contact Smiled Nodded	Pointed to the aisle
Steve	Made eye contact	Looked at his friend instead some of the time.
Abdul		Looked down at the customer Looked at his watch Shook head Shrugged Moved away
Gill	Nodded	Leant against a pillar Folded arms Didn't know where the product was

Task 5

Rufikat responded in the most positive way overall.

She could have improved her response by taking the customer to the correct place rather than pointing to it.

PAGES 1:9–1:12

Speaking and listening to customers on the phone

Task 2

Hello this is Marcia speaking from Brettles Brothers in Galway. This is a message for Mrs Young. This is just to let you know that the shoes you ordered are now in stock. We will keep them for you until Saturday May 12th. If you need any help, just give us a ring on 776241.
Goodbye and thank you.

Task 3

You may have written something like this.

Hello this is _____ speaking from Bits and Bobs DIY store. This is a message for Mr Singh.
This is to let you know that the spotlights you ordered are now in stock. We will keep them for you for three working days. If you need any help, just give us a ring on 984654.

Goodbye and thank you.

Task 4

1 You know how to get to the old store?
2 Pass the old store, keeping it on your right.
3 Follow the road round until you come to a roundabout.
4 Take the third turning off the roundabout.
5 You will pass a church on your left.
6 Keep going for about a quarter of a mile until you reach a second roundabout.
7 This time take the first exit and follow the signs to the car park on your left.
8 Have you got all that?
9 If you need any further help, don't hesitate to call again.

Task 5

1 Speaking too fast
2 Slow and hesitant
3 Mumbling – hard to hear
4 Sounds bored
5 Muddled – doesn't sound professional
6 Very rude

Task 6

The customer wants:

- an appointment with a personal shopper
- a suit
- a hat
- shoes
- a handbag
- a wedding present.

PAGES 1:13–1:16

Advising customers

Focus page

Customer 1 is probably describing a strimmer.

The key requirements of the tumble dryer for customer 2 are:

- fits under a worktop
- cream, not white.
- takes more than 4 kg
- switches off automatically.

Task 1

c

Task 2

You're looking for a car seat for an 18-month-old child that has washable covers, turns into a booster seat and costs under £60.

Task 3

- jewellery for a woman
- gold, as allergic to all other metals
- not a necklace or earrings

Task 4

gold bracelets
women's gold dress rings
range of brooches

Task 5

3 Deluxe car seat
5 Comfort-care car seat

Task 6

Seat 2 (Portable car seat) is for the correct age, has washable covers and can be used as a booster seat but it costs slightly more than £60.

PAGES 1:17–1:18

Dealing with complaints

PAGES 1:19–1:20

Promoting services

Task 1

1. The scheme helps customers to save money on their shopping bill by giving them vouchers to spend according to points they accumulate for money spent in the store.
2. The vouchers are sent to customers every 3 months if they have earned over 150 points.
3. Customers join the scheme by filling in an application form from the leaflet with their personal details and posting it free in the post box in the store.
4. The customers should call the free Helpline.
5. More information can be found by reading the customer information leaflet or visiting the website.
6. The card is found in the customer leaflet. Customers detach it and sign it on the back.

Task 2

Assistant 3 gives the best description of the scheme. She gives clear and precise information and uses positive language to help promote the card to the customer.

Task 3

Assistant **1** does not sound very positive. She uses vague language and doesn't sound as if she understands how the scheme works. Her explanation is hard to follow.

Assistant **2** uses jargon and technical language, which the customer is unlikely to understand.

PAGES 1:21–1:22

Dealing with returned goods

Task 1

1. The customer is returning a cardigan because the colour doesn't suit her.
2. The customer is entitled to the exchange she requests, provided the cardigan she is returning is in mint condition. She would also be entitled to a refund, as she has the receipt.

Task 2

1. No
2. Choose from: software, pre-recorded video tapes, DVDs, CDs
3. You may have written something like:
   Have you used the mobile phone?
   Have you used the SIM card?
   Have you got the original box, packaging and accessories?
   Have you got the receipt?
4. 1 year
5. Choose from: shavers, haircare products, electric toothbrushes, headphones.

Task 3

Offer to repair the item free of charge.

Check it

1	B	**6**	C
2	D	**7**	D
3	B	**8**	A
4	C	**9**	C
5	D	**10**	A