

Candidate Support Pack  
**HNC Management**



# Creating a Culture of Customer Care

[DJ42 34]





## Sample Activities

### Creating a Culture of Customer Care

## INTRODUCTION

It is important for you to complete the activities that are provided throughout the workbook. These activities are designed to help you start to apply your learning and prepare you for your final unit assessment.

This section is designed to help you access the activities included within the workbook. It looks at each of the activities and aims to help you generate your answers, by suggesting ways to complete the different activities. The information provided for each activity aims to help you create your answer by recommending a structure and possible approach, linked to the content of the learning programme.

It is recommended that you consider the information provided in this section before undertaking the activities themselves. Discussions with your tutor, regarding the activities, are also recommended before you initiate the work.

## SECTION 1

### ACTIVITY – INTERNAL CUSTOMER

<p><b>Activity</b></p>	<p>Identify your internal customers. Those people on whose desk your work lands, or the next department in the production process.</p> <ol style="list-style-type: none"> <li>1. Ask them if what you produce, and the way you present it to them, helps or hinders their work.</li> <li>2. Ask what changes you can make to your work to help them do their job better.</li> </ol>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to encourage you to find out more about people you work with in your organisation, your internal customers. When asking the questions above you should consider the following:</p> <ol style="list-style-type: none"> <li>1. What is the relationship between your department/job role and theirs?</li> <li>2. Where do you and they fit, in terms of the processes involved within the company? (E.g. Does their work follow on from yours, or do they supply something that you are selling?)</li> <li>3. How does your job, role or department affect them?</li> <li>4. What are the needs, requirements and restraints put upon them. (This is important to know if, for example, you say to an external customer that they can have a delivery by 2pm. You then find out that you have missed the last delivery from the warehouse. You then have to let the external customer down, which is not good for business.)</li> </ol> <p>Finally, write a report to summarise your findings, identifying your internal customers. Within your report, you should provide an assessment of your current working relationships. You should suggest ways to improve your working relationships with these customers, as appropriate.</p>

**ACTIVITY – CUSTOMER NEEDS**

<p><b>Activity</b></p>	<p>Think of your customers. Consider their individual needs and what it is that they expect of you in each of the five categories. Make a list of things to say or do and use it the next time you meet them.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to encourage you to find out more about the five categories that influence the needs of your customers.</p> <p>The five categories you need to consider were introduced to you as part of section 1.2.3:</p> <ul style="list-style-type: none"> <li>• Reliability</li> <li>• Responsiveness</li> <li>• Assurance</li> <li>• Empathy</li> <li>• Tangibles</li> </ul> <p>You should develop your answer by identifying your customers. You should then define their needs according to the factors above; highlighting any areas where you feel your current customer service falls short.</p> <p>With the needs of your customers clearly defined, you should then develop a list of ways to address the shortfalls in your current practice, so as to improve your customer service.</p>

**ACTIVITY – TELEPHONE POLICY**

<p><b>Activity</b></p>	<p>Draft a telephone policy for your organisation or department that incorporates excellence in telephone practice. Report on the effectiveness of the policy by phoning your office, and posing as a customer. Consider the following:</p> <ol style="list-style-type: none"> <li>1. Can you get through to your company's switchboard in five seconds?</li> <li>2. When the call is put through to your extension, does someone pick up your phone within five seconds?</li> </ol>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to encourage you to think about and improve, or even develop a telephone policy. You need to develop your telephone policy, defining standards to cover the following:</p> <ul style="list-style-type: none"> <li>• How long before the phone should be answered</li> <li>• The manner that should be adopted by people</li> <li>• How to speak</li> <li>• How to address customers</li> <li>• How to personalise calls</li> <li>• How to conduct oneself</li> <li>• How the needs of customers should be met</li> <li>• The information that should be given to customers</li> <li>• What to promise and commit the organisation to</li> <li>• How to record the call details</li> </ul> <p>The policy should be communicated to those responsible for using the phone. Once you are happy that everyone knows the approach you are recommending, complete the remainder of the activity. You may want to get someone who is neutral to make the call!</p> <p>You should write a report to introduce your policy and explain the standards included. Your report should include a summary of your findings regarding how well the policy worked.</p>

**ACTIVITY – WAITING TIMES**

<b>Activity</b>	<p>Note down the number of occasions when you have walked out or have become impatient with the time you've been made to wait.</p> <p>Set yourself (and your colleagues) a goal of a “no-wait” day. Try it out and evaluate and report on the success of the initiative. Make recommendations about what needs to be put in place for this to become more effective.</p>
<b>Suggested approach</b>	<p>This activity has been designed to encourage you to think about and improve customer waiting times. It encourages you to remember how frustrated you may have felt when having to wait. The challenge is to come up with a strategy to decrease or eliminate the waiting times of the customers you deal with and then to evaluate and improve.</p> <p>Firstly, reflect on when and where you have had to wait and as a result have walked out, or hung up and decided not to use the service.</p> <p>Now research where there are waiting times experienced by your customers (internal or external). With colleagues, put into place a strategy, aiming to achieve a ‘no-wait’ time, just for a day.</p> <p>Once established, you should test your strategy with the support of your colleagues. You should evaluate the impact of the strategy by assessing:</p> <ul style="list-style-type: none"> <li>• How waiting times have changed</li> <li>• The reaction of customers</li> </ul> <p>Following the completion of your evaluation, you should write a report describing your findings and making recommendations as to how your strategy could be further improved.</p>

**ACTIVITY – POLITENESS AUDIT**

<p><b>Activity</b></p>	<p>Use the above list as a checklist to audit your manners with (internal and external) customers today. Write a report on what you achieved and recommending actions to improve performance, as appropriate.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to encourage you to think about and improve politeness and good manners. It is often very easy to forget these two things, which are free, but can ‘buy’ so much goodwill.</p> <p>Review the checklist in the workbook on page 27 and come up with your own checklist on which to base your audit. Once established, you should test your own manners against the standard you have developed.</p> <p>When completing your audit:</p> <ul style="list-style-type: none"> <li>• Be honest with yourself</li> <li>• Get a colleague to observe or comment if you find self observation difficult. (Choose someone whose opinion you trust).</li> <li>• Evaluate and be realistic</li> </ul> <p>Following the completion of your audit, you should write a report describing your findings and making recommendations as to how you can improve your performance.</p>

**ACTIVITY – FRIENDLINESS**

<p><b>Activity</b></p>	<p>Review the welcomes used by your organisation (or department) when welcoming customers/clients. Comment on its appropriateness and recommend improvements, as appropriate.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to encourage you to think about how your organisation is first perceived by a customer. First impressions do count!</p> <p>When conducting your review you should:</p> <ul style="list-style-type: none"> <li>• Spend time visiting departments, or parts of your organisation that come face to face with external customers</li> <li>• Look at how internal customers are welcomed between departments/sections in your place of work</li> <li>• Make a note of how a customer is welcomed and also the customer's response to the welcome</li> </ul> <p>Remember the tips outlined in the workbook under the section on friendliness, when carrying out your review.</p> <p>When writing your comments and recommendations you should:</p> <ul style="list-style-type: none"> <li>• Consider any written company policy on welcoming customers</li> <li>• Think about relevant and workable ways in which you can make your department/organisation friendlier and more open to your customers</li> </ul>

**ACTIVITY –CUSTOMER CARE BOUNDARIES**

<p><b>Activity</b></p>	<p>Review your rules for dealing with both internal and external customers and clearly identify the boundaries. In other words: “If this happened, how far could you go and still maintain customer service”</p> <p>Report on how the customer and the company could benefit from a flexible approach.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to help you develop your understanding of the approaches used within customer care. You should use the information gained during any research activities carried out, relating to customer care policies and also information from Section 1 in the workbook.</p> <p>You should review your approach to customer care to:</p> <ul style="list-style-type: none"> <li>• Provide an overview of your customer care policy and the guidance it gives you in relation to dealing with customers in certain circumstances</li> <li>• Account for the reasoning behind the rules, in relation to practices that your company employs, in other words; why were they put into place?</li> <li>• Determine how well the rules work</li> <li>• Explain the effects of the rules on your customers</li> <li>• Describe the flexibility available for staff to use their initiative</li> </ul> <p>Once your review has been carried out, you should then consider if the approach is flexible enough, giving examples. If you find that the approach is not flexible enough, suggest practical ways as to how it can be made more flexible. The benefits to the company should also be listed.</p>

**ACTIVITY – CUSTOMER CARE REVIEW**

<p><b>Activity</b></p>	<p>Reflect on how you provide customer care within your organisation; ask yourself “If I was the customer, would I be satisfied with the information being provided?”</p> <p>Report honestly and openly about your findings.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to help you engage and relate with the feelings and expectations of your customers.</p> <p>Your response should be developed based on research completed within your organisation. You should identify the different ways that customer care is provided. For example:</p> <ul style="list-style-type: none"> <li>• The information that is given to customers at the beginning of the transaction. This could be product specifications, delivery times, warranty periods, product reliability etc.</li> <li>• How well the customers are kept informed of developments or changes throughout the process</li> <li>• How customers are able to communicate with the organisation</li> </ul> <p>Based on the information you have collected, you should write a report describing:</p> <ul style="list-style-type: none"> <li>• Whether you feel the customers are given enough information</li> <li>• If you feel the information and support given is effective, or raises false hopes and expectations</li> </ul>

**ACTIVITY – MOMENTS OF TRUTH**

<p><b>Activity</b></p>	<p>Consider the ‘Moments of Truth’ for you and your team.</p> <p>Write a report on the impression created and how you can turn them into positive impressions.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to encourage you to consider the ‘Moments of Truth’ that occur within your organisation, where customers make a judgement on the quality of your organisation. Before completing the activity you should complete the internet research described in Section 1.3.8.</p> <p>Your report should be developed based on research completed within your organisation or team. In developing your response to this activity, you need to talk to your customers, both internal and external, as appropriate. You need to research their ‘Moments of Truth’. What made your organisation or department stand out? Was their impression good or bad? What factors made them select or reject you or your organisation?</p> <p>Based on the information you have collected, you should write a report describing the ‘Moments of Truth’ and identify them as positive or negative. You should then make your recommendations; describing the practical ways in which these ‘moments’ can be built upon to support the development of customer care. For example:</p> <ul style="list-style-type: none"> <li>• How the positive moments of truth can be built upon and extended to others</li> <li>• How the negative moments can be eliminated through positive actions</li> </ul>

### ACTIVITY – PRODUCT KNOWLEDGE

<b>Activity</b>	Run an inter-department Olympics for your organisation on product knowledge. Report on your findings.
<b>Suggested approach</b>	<p>This is a fun activity which is designed to help develop product knowledge within your organisation, motivate your staff and improve customer care.</p> <p>You will need to organise an event for colleagues such as a quiz, treasure hunt or similar competition. The event should be designed to test people’s knowledge of the products and services on offer, as well as the values of the organisation you work for.</p> <p>Your report should describe:</p> <ul style="list-style-type: none"> <li>• How you organised your ‘Olympics’</li> <li>• The overall level of product knowledge</li> <li>• How the activity improved product knowledge</li> <li>• Whether you feel the ‘Olympics’ should be completed on a regular basis</li> </ul>

## SECTION 2

### ACTIVITY – CUSTOMER FOCUS

<b>Activity</b>	Consider the structure of your organisation or department. Describe its current customer focus and what could be done to increase this customer focus.
<b>Suggested approach</b>	<p>This activity has been designed to encourage you to do further research into how your organisation is structured and how customer focussed it is.</p> <p>Before developing your response you should familiarise yourself with the content of Section 2.2 and the research it recommends.</p> <p>Your answer should be developed based on research completed within your organisation. You should look at your organisation and decide on its structure:</p> <ul style="list-style-type: none"> <li>• Is it tall?</li> <li>• Is it flat?</li> <li>• Is it customer focused?</li> </ul> <p>The analysis and description of your organisation should include evidence to show the type of structure your organisation has. Here you may wish to describe:</p> <ul style="list-style-type: none"> <li>• The tiers of management that exist between the frontline staff and the Managing Director</li> <li>• The level of autonomy the frontline staff have in relation to dealing with customers</li> </ul> <p>When looking at the customer focus you should also consider:</p> <ul style="list-style-type: none"> <li>• What priority the customer has within the organisation and whether the customer is the most important person in the organisation</li> <li>• Who has direct contact with customers</li> <li>• Whether front line staff are empowered to become the ‘leaders’ in creating positive experiences for customers</li> </ul> <p>Your report should recommend possible changes that could be made to you organisation to improve customer focus.</p>

**ACTIVITY – GUIDING PRINCIPLES**

<b>Activity</b>	Consider the ‘guiding principles’ of Virgin Atlantic Airways. Evaluate and report on how your team compares with these statements.
<b>Suggested approach</b>	<p>This activity has been designed to encourage you to do further research into the philosophy which underlines your customer care policy.</p> <p>Your response should be developed based on research completed within your team or organisation. Your research will help you to define the ‘guiding principles’ used. When carrying out your research, you should investigate whether there is a written statement or policy on customer service. Talk to colleagues who may have been involved in its development and also those on the front line, who deal with customers on a daily basis.</p> <p>When comparing your policy to Virgin Atlantic Airways consider:</p> <ul style="list-style-type: none"> <li>• What the underlying philosophy may be (are customers the number one priority?)</li> <li>• If it is customer focussed (give examples)</li> <li>• If it gives staff responsibility, authority and autonomy</li> <li>• If staff are supported in their decisions</li> <li>• If it encourages staff to think ‘outside the box’</li> </ul> <p>Your report should contain a critique of your team or organisation’s policy in relation to Virgin Atlantic Airways.</p>

**ACTIVITY – STANDARDS OF SERVICE**

<b>Activity</b>	Consider your own job and draft your own personal standards of service.
<b>Suggested approach</b>	<p>Your job is likely to involve you interacting with customers all the time. This activity has been designed to help you complete a self-review and consider how <b>you</b> deal with both internal and external customers. It will be useful for you to have a personal standard which you can use as a benchmark when dealing with customers.</p> <p>Section 2.3 in the workbook is concerned with ‘walking the talk’ or setting an example. Read through this section and also the ‘Ten Tips for Excellent Customer Service’.</p> <p>Spend time reflecting on your own approach to customer service and identify your own standards. Consider:</p> <ul style="list-style-type: none"> <li>• What your priorities are</li> <li>• What your job role requires of you</li> <li>• The professional standards you require</li> </ul> <p>You should also talk to your customers and get them to comment on your customer service and how it is perceived.</p> <p>Based on your research draw up your own personal standards of service in relation to your work role and customers you deal with.</p>

**ACTIVITY – EMPOWERMENT**

<b>Activity</b>	Consider your team. Describe which of the five levels of empowerment applies now and recommend what needs to be done to reach level 5? If nothing needs to be done because you are at level 5, justify your reasoning.
<b>Suggested approach</b>	<p>This activity has been designed to help you develop your understanding of the five stages of empowerment and how they apply to your job role. You should use information gained from talking to colleagues and from previous activities carried out in the workbook, to demonstrate where you think your team is.</p> <p>You should base your analysis on the five stages of empowerment found in Section 2.4 in the workbook. You should honestly assess the way your team works and allocate a stage of empowerment to it. Consider the following:</p> <ul style="list-style-type: none"> <li>• At stage one, the manager makes the decisions and informs the team</li> <li>• At stage two, the manager asks the team for suggestions</li> <li>• At stage three, the manager and the team discuss the situation at length, management asks for proposals and input</li> <li>• At stage four, decisions are made co-operatively</li> <li>• At stage five, the manager delegates the decision making process to the team</li> </ul> <p>Your response should provide actual evidence from the workplace to support your decision, justifying how you have positioned your team at a certain stage.</p> <p>Finally, depending on your findings, you should recommend ways in which the empowerment of the team can be improved. If however, you feel that your research does not require any further development, then you should justify this decision, linked to actual work based examples of empowerment in action.</p>

**ACTIVITY – CUSTOMER CARE PROCEDURES**

<p><b>Activity</b></p>	<p>Describe the customer care procedures that are currently in place within your organisation. Identify any areas that you would consider revising and any new aspects of the policy that need to be established.</p>
<p><b>Suggested approach</b></p>	<p>This activity has been designed to focus your attention on your organisation's customer care policy, so that you fully understand its content and purpose.</p> <p>You should review the full policy and decide whether you think it is 'fit for purpose'. Base this decision on your knowledge gained from the workbook and CD, any activities completed and research carried out.</p> <p>In developing your answer, you should familiarise yourself with the detail of the policy and how it is applied in practical terms on a daily basis. You need to review how effective your policy is by:</p> <ul style="list-style-type: none"> <li>• Conducting a customer survey</li> <li>• Monitoring internal and external customer satisfaction</li> <li>• Obtaining feedback from staff that regularly deal with customers</li> </ul> <p>Using the results of your feedback, you should decide whether the policy is effective, stating your reasons and giving evidence to back this up. From there, you should then suggest areas for revision and also new initiatives to improve customer care, if appropriate.</p>

**ACTIVITY – AFTERCARE**

<b>Activity</b>	Describe the aftercare communication you use in your organisation and list any ideas you have regarding how it could be improved.
<b>Suggested approach</b>	<p>This activity has been designed to focus your attention on your aftercare policy.</p> <p>You should review the policy and the practical ways in which it is implemented by staff. You should analyse your findings and decide whether you feel there is room for improvement. Base this decision on your knowledge gained from the workbook, CD and research carried out on the web.</p> <p>Your list should include evidence to support your ideas. The evidence should be based upon previous examples of customer aftercare and their effectiveness.</p>

## SECTION 3

### ACTIVITY – SWOT

<b>Activity</b>	Conduct a SWOT analysis of your organisation. Evaluate your analysis and report on what needs to be done to achieve its vision?
<b>Suggested approach</b>	<p>This activity should enable you to focus upon the vision of your organisation and identify its strengths, weaknesses, opportunities and threats.</p> <p>You need to make sure you involve as many people as possible in your analysis and be honest.</p> <p>Remember, when conducting your analysis that:</p> <ul style="list-style-type: none"> <li>• Strengths and weaknesses relate to internal factors within your organisation</li> <li>• Opportunities and threats relate to external factors outside the control of your organisation</li> </ul> <p>When considering the external factors, it may help you to think of them in terms of STEP. This means Sociological, Technological, Economic and Political.</p> <p>Review your organisation’s vision and decide, in the light of your SWOT analysis, if more can be done to achieve it. You may like to relate this to the area of customer care and make improvements there first.</p> <p>Finally, write a report to summarise your findings, providing a summary of your SWOT analysis. You should identify the areas where you feel changes are required to further improve customer care. These areas are likely to relate to your weaknesses and hopefully can be dealt with using available opportunities.</p>

### ACTIVITY – THE CUSTOMER CYCLE

<p><b>Activity</b></p>	<p>Describe typical customer interactions with your organisation. Think of every 'step' the customer takes and devise standards for each step.</p> <p>Ask your team to review the standards and improve on them.</p>
<p><b>Suggested approach</b></p>	<p>This activity is all about focussing upon your customer's interaction and as a result, the positive or negative experiences that occur within your organisation. It may be that there are many ways customers interact within your organisation, so you will need to select a type of customer who you deal with on a regular basis.</p> <p>Focus upon an interaction you, or your team, are responsible for. Work through the following:</p> <ul style="list-style-type: none"> <li>• Map out the stages of customer interaction that happen and the points at which positive or negative experiences can occur</li> <li>• Set out your standards of care for each interaction (use the workbook to help you with this)</li> <li>• Base your standards upon your evidence collected and relate them to your organisation's vision statement (show your evidence and reasoning)</li> </ul> <p>Take your 'standards of care' to members of your team and involve them in the review and improvement of the standards.</p> <p>Finally, write a report summarising your findings. You should identify the areas where you feel your standards will further improve customer care.</p>

**ACTIVITY – CUSTOMER RESEARCH**

<p><b>Activity</b></p>	<p>Describe the research methods used in your organisation and comment if they provide you with the right mix of qualitative and quantitative information.</p> <p>Recommend ways these methods could be improved?</p>
<p><b>Suggested approach</b></p>	<p>This activity is all about how your organisation gains feedback from its customers and how it measures customer satisfaction rates.</p> <p>You should research how your organisation identifies:</p> <ul style="list-style-type: none"> <li>• What the customer thinks about your organisation</li> <li>• How customers feel the organisation could be run in a better way</li> <li>• What it needs to know and should know about its customers</li> <li>• Key Performance Indicators (KPIs) for the service it uses</li> </ul> <p>You should describe the methods used to determine:</p> <ul style="list-style-type: none"> <li>• Customer satisfaction</li> <li>• If KPIs have been achieved</li> </ul> <p>In your report you should explain your findings and include evidence to show whether you feel the research undertaken gives the right mix between qualitative and quantitative research methods.</p> <p>Finally, based upon the findings of your research, suggest ways to improve the effectiveness of gaining feedback from customers. You should provide evidence for this.</p>

**ACTIVITY – FEEDBACK**

<b>Activity</b>	Describe what your organisation does with customer feedback and suggest how it could be used to improve your service
<b>Suggested approach</b>	<p>This activity will encourage you to focus upon how customer feedback is used to improve your organisation. Based upon your investigations in the activity on ‘Customer Research’, you should further investigate what is done with the information gained from the research.</p> <p>You should consider if:</p> <ul style="list-style-type: none"> <li>• Feedback is sent to the relevant departments or staff and what happens to the results there</li> <li>• Feedback from internal customers is sought and acted upon</li> <li>• Feedback forms part of a process of ongoing review and continuous improvement</li> <li>• Staff are empowered to act upon feedback, with the full support of the organisation</li> </ul> <p>Based upon your research you should write a report suggesting ways to improve the use of customer feedback and therefore improve customer satisfaction for the future.</p>