

Assessment

**Task 2**

**Demonstrate leadership in the workplace**

**BSBLDR411**



**Student Declaration**

To be filled out and submitted with assessment responses

◻ I declare that this task and any attached document related to the task is all my own work and I have not cheated or plagiarised the work or colluded with any other student(s)

◻ I understand that if I am found to have plagiarised, cheated or colluded, action will be taken against me according to the process explained to me

◻ I have correctly referenced all resources and reference texts throughout these assessment tasks.

◻ I have read and understood the assessment requirements for this unit

◻ I understand the rights to re-assessment

◻ I understand the right to appeal the decisions made in the assessment

|  |  |  |
| --- | --- | --- |
| **Unit Title**  **Unit Code** | | |
| **Student name** |  | |
| **Student ID number** |  | |
| **Student signature** |  | **Date** |
| **Task Number** |  |  |

|  |
| --- |
| **------OFFICE USE ONLY-----**  For Trainer and Assessor to complete:  ◻ Student requested reasonable adjustment for the assessment |

| **Marking Sheet**  **Completed successfully**  **Did the student satisfactorily:** | **Comments** | **Y** | **N** | **DNS** |
| --- | --- | --- | --- | --- |
| The student has satisfactorily completed and submitted the following:   * Addressing of tasks in Task 2.1:  1. Organisation's requirements for performance management 2. Qualities required for positive performance management 3. Organisation's standards and values for conducting business 4. How own performance will contribute to upholding organisational values 5. Issues to be resolved according to organisational values and summary of gathered information 6. Key performance indicators that can support the achievement of business objectives and support the way of conducting business  * Performance Management Plan for the team in Task 2.2A * Risk Management Strategies -team in Task 2.2B * Changes to performance management plan for the team in Task 2.2B * Feedback form in Task 2.2C * Social media post in Task 2.2D * Performance management plan -individual in Task 2.3A * Risk Management Strategies- individual in Task 2.3B * Changes to performance management plan for individual in Task 2.3B * Email to Sarah White in Task 2.3C * Reflection in Task 2.4 |  |  |  |  |
| Demonstrated ability to:   * Identify organisation's requirements for management performance * Identify qualities required for positive management performance according to organisational policies and procedures * Establish key performance indicators according to organisation's business objectives * Locate and assess organisation's standards and values for conducting business * Identify how own performance will contribute to upholding organisational values * Identify issues to be resolved according to organisational values * Gather and organise information relevant to the issues under consideration   This is evidenced by:  Addressing of tasks in Task 2.1:   1. Organisation's requirements for performance management 2. Qualities required for positive performance management 3. Organisation's standards and values for conducting business 4. How own performance will contribute to upholding organisational values 5. Issues to be resolved according to organisational values and summary of gathered information 6. Key performance indicators that can support the achievement of business objectives and support the way of conducting business |  |  |  |  |
| The student met with the team in week 3 of class (Role-Play) to develop the team performance plan in consultation with team members:   * Explained the issues that have been identified * Reinforced performance expectations ad targets * Gathered information and inputs from the team * Involved the team in decision-making about the best course of action to improve team performance * Agreed on the content of the performance plan * Gained commitment from the team about adherence to the performance plan * Listened actively * Used questioning to gather information and inputs from the team * Encourage two-ways conversation * Encourage team members to express their views   Feedback in Comments. |  |  |  |  |
| The student met with the individual team member (Role-Play) in week 4 to develop the individual performance management plan:   * Explained the issues that have been identified * Reinforced performance expectations ad targets * Gathered information and inputs from the team member * Involved the team member in decision-making about the best course of action to improve their performance * Agreed on the content of the performance plan * Gained commitment from the team member about adherence to the performance plan * Listened actively * Used questioning to gather information and inputs from the team member * Encouraged two-ways conversation * Encouraged team members to express their views   Feedback in Comments. |  |  |  |  |
| Demonstrated ability to:   * Identify qualities required for positive management performance according to organisational policies and procedures * Identify how own performance will contribute to upholding organisational values * Comply with organisation's standards and values * Evaluate own behaviour and performance against organisational standards and values and adjust to achieve required standards * Ensure own behaviour and performance contributes to the integrity and credibility of the organisation   This is evidenced by:   * Reflection in Task 2.4 |  |  |  |  |
| Demonstrated ability to:   * Develop and implement performance plans for individual and team according to the organisation's business objectives' * Establish key performance indicators according to the organisation's business objectives * Identify issues to be resolved according to organisational values * Gather and organise information relevant to the issues under consideration * Develop plan to implement decisions agreed by relevant individuals and teams   This is evidenced by:   * Performance Management Plan for the team in Task 2.2A * Risk Management Strategies -team in Task 2.2B * Changes to the performance management plan for the team in Task 2.2B * Feedback form in Task 2.2C * Social media post in Task 2.2D * Performance management plan -individual in Task 2.3A * Risk Management Strategies- individual in Task 2.3B * Changes to the performance management plan for an individual in Task 2.3B * Email to Sarah White in Task 2.3C |  |  |  |  |
| Demonstrated ability to:   * Facilitate individual's and team's active participation in team decision-making processes   This is evidenced by:   * Performance Management Plan for the team in Task 2.2A * Performance management plan -individual in Task 2.3A * Meeting with the team (Role-Play) – refer to feedback on marking sheet * Meeting with the individual team member (Role-Play) – refer to feedback on the marking sheet |  |  |  |  |
| Demonstrated ability to:   * Examine options and assess associated risks to determine preferred course of action   This is evidenced by:   * Risk Management Strategies -team in Task 2.2B * Changes to the performance management plan for the team in Task 2.2B * Risk Management Strategies- individual in Task 2.3B * Changes to the performance management plan for an individual in Task 2.3B |  |  |  |  |
| Demonstrated ability to:   * Use feedback processes to monitor the implementation and impact of decisions   This is evidenced by:   * Feedback form in Task 2.2C * Social media post in Task 2.2D * Email to Sarah White in Task 2.3C * Reflection in Task 2.4 |  |  |  |  |
| When collaborating with the group, the student has actively participated in group work with a substantial contribution that can be assessed individually for all the task requirements. |  |  |  |  |
| **Task Outcome: Satisfactory  Not Yet Satisfactory** | | | | |
| **Student Name:** | | | | |
| **Assessor Name**:  **Assessor Signature:**  **Date:** | | | | |

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# **Task 2 – Demonstrate leadership in the workplace**

| **Task summary and instructions** | |
| --- | --- |
| **What is this assessment task about?** | You have recently been hired as a **Customer Service Team Leader** at Australian Hardware. In order to help the organisation achieve its strategic goals, you will need to ensure a coordinated and integrated approach to operational management across the organisation.  Read the information provided in the link to the organisation's website is: <http://australianhardware.simulations.australiantrainingproducts.com.au/>  And read Appendix 1,2,3.  In your role as Team Leader you will have to demonstrate that you can:   * Prepare to demonstrate leadership of the team * Align your behaviour with organisational values * Model leadership behaviours   This task comprises of the following assessment methods:   * Product-based * Direct observation of Role-Play * Case Study * Other (specify)   It has been designed to evaluate your ability to/competency in:   * Identify organisation's requirements for management performance * Identify qualities required for positive management performance according to organisational policies and procedures * Develop and implement performance plans for individual and team according to organisation's business objectives * Establish key performance indicators according to organisation's business objectives * Locate and assess organisation's standards and values for conducting business * Identify how own performance will contribute to upholding organisational values * Identify issues to be resolved according to organisational values * Gather and organise information relevant to the issues under consideration * Facilitate individual's and team's active participation in team decision-making processes * Examine options and assess associated risks to determine preferred course of action * Develop plan to implement decisions agreed by relevant individuals and teams * Use feedback processes to monitor the implementation and impact of decisions * Comply with organisation's standards and values * Evaluate own behaviour and performance against organisational standards and values and adjust to achieve required standards * Ensure own behaviour and performance contributes to the integrity and credibility of the organisation   Your assessor will be looking for demonstrated evidence of your competency in the above.  Please note that the performance evidence for this unit require students to develop and implement at least two performance plans, including one relating to individuals and one relating to teams. This assessment has been designed to meet that requirement.  You are required to address the following:   * **Task 2.1 Prepare for leadership** * Analyse the Case Study company and scenarios provided to prepare to apply leadership in managing the team * **Task 2.2 Performance management -team** * Developa performance management plan for the team in consultation with team members * Plan for risk management and adjust action plan accordingly * Develop a feedback form to monitor the implementation of the plan * Develop a social media post to address feedback from the team * **Task 2.3 Performance management -individual** * Develop a performance plan for an individual team member in consultation with the team member * Plan for risk management and adjust action plan accordingly * Address feedback about performance improvement * **Task 2.4 Reflection** * Reflect on the performance as a Team Leader   Although the assessment requires group collaboration to simulate a work environment, the assessment submission is individual, and it will be marked as such. |
| **What do I need to do to complete this task satisfactorily?** | * submit the completed assessment tasks, according to instructions, * complete the tasks with sufficient detail and present them in a professional manner, * use your own words and reference sources appropriately, * meet the word count where required, * use the scenario provided, * use the templates provided where required, * for your performance to be deemed satisfactory in this assessment task you must satisfactorily address all of the assessment criteria, * if part of this task is not satisfactorily completed you will be asked to complete further assessment to demonstrate satisfactory performance. |
| **Specifications** | **You must deliver/participate in:**   * Meeting with the team in week 3 to develop the performance plan for the team (Role-Play) * Meeting with the individual team member in week 4 to develop the individual performance management plan (Role-Play)   **You must submit to GOALS**   * Addressing of tasks in Task 2.1:  1. Organisation's requirements for performance management 2. Qualities required for positive performance management 3. Organisation's standards and values for conducting business 4. How own performance will contribute to upholding organisational values 5. Issues to be resolved according to organisational values and summary of gathered information 6. Key performance indicators that can support the achievement of business objectives and support the way of conducting business  * Performance Management Plan for the team * Risk Management Strategies -team * Changes to performance management plan for the team * Feedback form * Social media post * Performance management plan -individual * Risk Management Strategies- individual * Changes to performance management plan for individual * Email to Sarah White * Reflection |
| **Resources and equipment** | * Computer with Internet access * Access to Microsoft Office suites or similar software * Learning material * Scenario for assessment as provided * Appendices as provided * Relevant policies and procedures as provided * Templates as provided |
| **Re-submission opportunities** | You will be provided feedback on your performance by the Assessor. The feedback will indicate if you have satisfactorily addressed the requirements of each part of this task. If any parts of the task are not satisfactorily completed, the assessor will explain why, and provide you written feedback along with guidance on what you must undertake to demonstrate satisfactory performance. Re-assessment attempt(s) will be arranged at a later time and date. You have the right to appeal the outcome of assessment decisions if you feel that you have been dealt with unfairly or have other appropriate grounds for an appeal. You are encouraged to consult with the assessor prior to attempting this task if you do not understand any part of this task or if you have any learning issues or needs that may hinder you when attempting any part of the assessment. |

**Complete the following activities:**

## **Task 2.1 Prepare for leadership**

You have recently been hired as a Customer Service Team Leader in the new Customer Service Division at Australian Hardware. To help the organisation achieve its strategic goals, you will need to ensure a coordinated and integrated approach to operational management across the organisation.

The link to the organisation's website is: <http://australianhardware.simulations.australiantrainingproducts.com.au/>

Read Appendix 1 and information about the organisation on their website.

Performance management is the process of ensuring that a set of activities and outputs meets an organisation's goals effectively and efficiently. Performance management can focus on the performance of an organisation, a department, an employee, or the processes in place to manage particular tasks.

Focus on your role as a Team Leader. Complete the following tasks based on the analysis of your role, your team and the organisation.

1. Identify the organisation's requirements for performance management relevant to your role.

Document your analysis in the space provided below.

(50-100 words)

|  |
| --- |
|  |

1. Identify the qualities required for positive performance management according to organisational policies and procedures and leadership principles.

Document your analysis in the space provided below.

(40-80 words)

|  |
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1. Locate and assess the organisation's standards and values for conducting business.

This may include their history, vision and mission statements, business plan, policies and procedures, etc.

In your analysis, consider, for example, the following questions:

* + How does the organisation conduct business?
  + What do they stand for? What are their values?
  + What are their business standards?
  + What performance would they value from employees?
  + What type of leader would suit this organisation?

Summarise your evaluation in the space provided below.

(50-100 words)

|  |
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|  |

1. Reflect on your role.

Identify how your own performance will contribute to upholding organisational values.

Summarise your reflection in the space provided below.

(30-50 words)

|  |
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|  |

1. Refer to Appendix 2 and 3. Identify issues to be resolved according to organisational values and summarise information about them.

Document your analysis in the space provided below.

(50-100 words)

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1. Establish four (4) key performance indicators that can support the achievement of business objectives and support the way of conducting business at Australian Hardware.

Document the KPIs in the space provided below.

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## **Task 2.2 Performance management -team**

This task requires you to:

* Develop a performance management plan for the team (Template 1)
* Develop an action plan to implement the performance management for the team
* Facilitate active team participation in decision-making
* Identify, analyse and manage risks associated with implementing the action plan
* Develop a feedback form to monitor the implementation of the action plan
* Develop a social media post to respond to feedback received

Review the issues relating to team performance identified in reading Appendix 1 and 2.

1. **Performance Management Plan -Team**

Schedule a time with the trainer and assessor in week 3 of class and develop a performance management plan in consultation with the team. (Role-Play 15-30 minutes)

A group of classmates will play the role of team members.

When meeting with the team:

* Explain the issues that have been identified
* Reinforce performance expectations ad targets
* Gather information and inputs from the team
* Involve the team in decision-making about the best course of action to improve team performance
* Agree on the content of the performance plan
* Gain commitment from the team about adherence to the performance plan

The trainer and assessor will evaluate your performance during the meeting and provide feedback on the marking sheet.

If you are absent from class, you are responsible for making alternative arrangements with the trainer and assessor to perform the Role-Play.

Use the templates provided below and follow the instructions.

**Template 1 -Performance Management Plan -Team**

|  |  |  |  |
| --- | --- | --- | --- |
| **Team Performance Plan** | | | |
| **Team/Department** | |  | |
| **Supervisor/Manager** | |  | |
| **Date** | |  | |
| **Vision/Aim of the performance plan** | |  | |
| **Performance Issues** | |  | |
| **Objectives for Team Improvement** | | | |
| ***Objective***  (3-4) | | ***Target/KPIS***  (one/objective) | |
| 1. | |  | |
| 2. | |  | |
| 3. | |  | |
| 4. | |  | |
| **Review and Assessment Methods**  (how will you track the plan's implementation, the team's progress: through team meetings, reports, etc.) | |  | |
| **Additional Support**  (is there any additional support needed to reach the desired goals: courses, classes, resources?) | |  | |
| **Expected Outcome**  (manager/supervisor's expectations on the outcome based on the data) | |  | |
| **Action Plan for Implementation** | | | |
| **Action/Task**  (4-6) | **Responsibility** | **Deadline** | **Resources needed** |
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| **Outcome if goals and objectives are not reached**  (identify the consequences and further steps if the team fails to satisfy the standards set by the performance plan) | |  | |

1. **Risk Management**
2. Identify and analyse four (4) risks associated with implementing the action plan included in the performance plan for the team.

Determine a risk treatment strategy for each risk establish if you should change/adjust the action plan.

Document your work using Template 2.

**Template 2 -Risk Management Strategy**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Risk description | Potential impact | Probability | Impact | Priority | Risk management strategy |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. Establish if the action plan developed as part of the performance management plan for the team require any change/adjustments based on the risk analysis.

Document the changes/updates in the space provided below.

If no change or update is required, explain why.

|  |
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1. **Feedback**

Create a 'team feedback form' to collect information regarding the implementation of the performance plan.

Develop 5-6 questions (a mix of closed and open-ended questions) to determine how the plan's implementation is progressing and if any change is needed.

Record the questions in Template 3, provided below.

Please note that under 'Answer', you can add a rating scale (example: very satisfied, satisfied…)

|  |  |
| --- | --- |
| **Feedback Form** | |
| Thank you for taking the time to complete the Team Performance Improvement Feedback Form.  The survey should take less than five (5) minutes to complete, and it will provide us with insights to improve the team performance plan we developed together. | |
| **Question** | **Answer** |
|  |  |
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1. **Social media post**

Assume that you have received the following feedback from the team: they do not understand why they should improve their work performance by spending so much time training.

Develop a social media post to share with them on the team's FB page to promote the value of training for professional development.

The post can be as simple as image +text.

Document the post in the space provided below.

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## **Task 2.3 Performance management -individual**

This task requires you to:

* Develop a performance management plan for an individual team member (Template 4)
* Develop an action plan to implement the performance management for the individual
* Facilitate the active participation of the team member in decision-making
* Identify, analyse and manage risks associated with implementing the action plan
* Address feedback related to the implementation of the action plan

Review the issues relating to individual team member performance identified in reading Appendix 1 and 2 and 3.

1. **Performance Management Plan -Individual**

Schedule a time with the trainer and assessor in week 4 of class and develop a performance management plan in consultation with the individual team member. (Role-Play 15-30 minutes)

A classmate will play the role of the individual team member -Sarah White.

When meeting with the team member:

* Explain the issues that have been identified
* Reinforce performance expectations ad targets
* Gather information and inputs from the team member
* Involve the team member in decision-making about the best course of action to improve their performance
* Agree on the content of the performance plan
* Gain commitment from the team member about adherence to the performance plan

The trainer and assessor will evaluate your performance during the meeting and provide feedback on the marking sheet.

If you are absent from class, you are responsible for making alternative arrangements with the trainer and assessor to perform the Role-Play.

Use the templates provided below and follow the instructions.

**Template 4 -Performance Management Plan -Individual**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| PERFORMANCE MANAGEMENT AGREEMENT | | | | | |
| Employee Name | |  | **Manager Name** | |  |
| Role & Department | |  | **Role & Department** | |  |
| DATE | **PERIOD** | | | **REVIEW DATES** | |

**Meeting notes**

|  |  |  |  |
| --- | --- | --- | --- |
| Item | | Discussion | Action Points |
| 1 | Manager outline of performance issues |  |  |
| 2 | Employee response/identification of support needs, etc |  |  |
| 3 | Identify Performance Goals  (2) |  |  |
| 4 | Develop Learning and Development Plan  (2) |  |  |
| 6 | Summary of Action Points |  | |
| 7 | Set a date for the next review |  | |

**Performance Goals**

|  |  |
| --- | --- |
| **Task / Responsibility**  (2) | **Required outcomes**  (1/performance goal) |
| <Task or behaviour required for the job>  List the tasks and responsibilities that are relevant to the employee's position.  e.g. – Monitor email enquiries. | <Describe what the employee needs to do to achieve the task or responsibility successfully>  The required outcomes must be specific, measurable and realistic. In most cases, the required outcomes will be described as a measurement of quality, quantity or timeliness.  e.g. – All enquiries must be responded to within 2 business days of receipt. |
|  |  |
|  |  |

**Learning and development plan**

| **Task / Responsibility**  (2) | **Required outcomes**  (1/task-responsability) |
| --- | --- |
| <Enter details of the skills and behaviours the employee would like to improve. This may be to improve outcomes or to develop new skills for future career goals.>  For example – Improve customer service skills so that I can handle complex enquiries. | <List agreed on strategies to achieve the development>  e.g. coaching, on-the-job training, external training. |
|  |  |
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**Action Plan**

Develop an action plan to implement the performance management plan.

| **Action Plan for Implementation** | | | |
| --- | --- | --- | --- |
| **Action/Task**  (3-5) | **Responsibility** | **Deadline** | **Resources needed** |
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1. **Risk Management**
2. Identify and analyse three (3) risks associated with implementing the action plan included in the performance plan for the team member.

Determine a risk treatment strategy for each risk establish if you should change/adjust the action plan.

Document your work using Template 2.

**Template 2 -Risk Management Strategy**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Risk description | Potential impact | Probability | Impact | Priority | Risk management strategy |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. Establish if the action plan developed as part of the performance management plan for the team member requires any change/adjustments based on the risk analysis.

Document the changes/updates in the space provided below.

If no change or update is required, explain why.

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1. **Response to feedback**

Assume that you have gathered the following feedback:

* Sarah is still often late for work.
* Sarah has not attended one of the training session agreed on the performance management plan.
* Sarah has been seen crying in the office.

Write an email (Template 5) to Sarah to address the feedback.

The email text should be in grammatically correct English, written in an appropriate (polite, business-like) style.

(80-120 words)

**Template 5 -Email**

|  |
| --- |
| Email to Sarah White |
| **To**: |
| **Cc**: |
| **Bcc**: |
| **Subject**: |
| **Date email is sent**: |
| **Attachments**: |
|  |

## **Task 2.4 Reflection**

Reflect on your work in the previous tasks and how you managed the team and the individual team member:

* Have you demonstrated the qualities required for positive management performance? What did you do well? What could you improve?
* Did your performance as a Team Leader contributed to upholding organisational values? How? Provide an example.
* How did you comply with organisational standards and values? Provide an example.
* Did your behaviour and performance as a Team Leader contributed to the integrity and credibility of the organisation? How? Provide an example.

Document your reflection in the space provided below.

(50-100 words)

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# **Appendix 1 – Scenario**

You have recently been hired as a **Customer Service Team Leader** at Australian Hardware. To help the organisation achieve its strategic goals, you will need to ensure a coordinated and integrated approach to operational management across the organisation.

The link to the organisation's website is: <http://australianhardware.simulations.australiantrainingproducts.com.au/>

According to current strategic and operational plans, the customer service team at Australian Hardware has been working together for a few months now to deliver higher quality of customer service.

The team comprises of:

* 2 x Customer Service Officers (Sarah and Mark)
* 1 x Complaint Officer (Joanne)
* 1 x Team Leader (Taylor)

The **Position Descriptions** of the team members are:

**Customer Service Team Leader Position description**

**Australian Hardware**

**Position Description**

**Team Leader**

**Role summary**

The Customer Service Team Leader supervises and coordinate the work of the Customer Service Team at Australian Hardware Company.

The primary role of the Team Leader within the team is to coordinate the day-to-day operations.

**Responsibilities**

* Plan and coordinate task
* Support team members
* Coach team members
* Evaluate team performance and implement improvements
* Manage the daily operations of the team
* Step in when team members need help with customer concerns and/or queries
* Encourage a positive and collaborative work environment
* Monitor operational performance
* Analyse, evaluate and implement feedback from customers and colleagues
* Assist the Customer Service Manager as required
* Support the response to customer complaints
* Achieve KPis as set by the Customer Service Manager

**Skills and personal attributes**

* Advanced written and verbal communication skills
* Professional personal presentation
* Advanced Customer Service skills
* Sales skills
* Reliability and stress tolerance
* Organisational skills
* Interpersonal skills
* Leadership skills
* Coaching skills
* Complaint handling skills

**Professional experience and qualification**

* Previous experience in a similar role
* Diploma in Business or similar qualifications
* Knowledge of MS Office Suite (Word, Excel, Outlook, PowerPoint) – Advanced
* Knowledge of CRM systems

**Reporting**

A Team Leader must always perform their duties in line with the organisation's policy and procedures, service standards and code of practice. They should operate within their level of authority and responsibilities. A Team Leader recognises that or is unsure whether the task falls in their scope of authority; they should immediately consult their direct manager.

**Customer Service Officer Position description**

**Australian Hardware**

**Position Description**

**Customer Service Officer**

**Role summary**

The Customer Service officer is the first point of contact for Australian Hardware Company.

The primary role of a Customer Service Officer within the team is to respond to a variety of customer enquiries and requests.

These may include enquires about:

* Types of products available
* Product prices
* Troubleshooting
* Warranty
* Troubleshooting requests

**Responsibilities**

A customer service officer is responsible for the following duties:

* Responding to a range of enquires including:
  + Types of products available
  + Product prices
  + Store locations
  + Troubleshooting
  + Warranty
* Recording all enquiries and action on enquiries as required
* Promoting products
* Updating customer's details
* Referring customers to appropriate technical support if required.
* Responding to complaints following company policy
* Sales

**Skills and personal attributes**

* Advanced written and verbal communication skills
* Professional personal presentation
* Advanced Customer Service skills
* Sales skills
* Reliability and stress tolerance
* Organisational skills
* Interpersonal skills

**Professional experience and qualification**

* Previous experience in a similar role is highly desirable
* Certificate IV in Business or similar qualifications – Essential
* Knowledge of MS Office Suite (Word, Excel, Outlook, PowerPoint) – Advanced

**Reporting**

A Customer service officer must always perform their duties in line with the organisation's policy and procedures, service standards and code of practice. They should operate within their level of authority and responsibilities.

Where a customer service officer recognises that or is unsure about whether the task falls in their scope of authority, they should immediately consult their Team Leader.

If the Team Leader is not available, customer service officers should report to the Customer Service Manager.

**Complaint Officer**

**Australian Hardware**

**Position Description**

**Complaint Officer**

**Role summary**

The complaint Handling Officer is responsible for ensuring that the organisation's complaint handling system is responsive to complainants. Complainants are more likely to be satisfied with the complaint handling system if the person dealing with their complaint is competent, objective and efficient.

**Responsibilities**

A Complaint Officer is responsible for the following duties:

* Writing, editing and proofreading responses to clients
* Have the skills to be able to act with sensitivity as well as be objective and impartial
* Managing existing complaints based on received dates within 48 hrs
* Build and maintain a professional relationship with clients
* Raise the matter with a superior should such an issue arise
* Respond to customers' enquiries on social media
* Ensure the complaints are confidentiality maintained and appropriate information technology equipment is used to store the information, with access to the organisation's complaint handling database and reference material

**Skills and personal attributes**

* Excellent written and verbal communication skills
* Creativity and the ability to develop original content
* Ability to build content that provokes engagement
* Leadership qualities
* Good customer service skills
* Ability to work independently and in teams
* Stay updated on industry trends and adjust the content as needed

**Professional experience and qualification**

* Diploma in communications or related fields – Essential
* Relevant IT knowledge
* Experience in working with complaints forms and CRM system
* Proficiency with popular complaint management systems
* 3-4 years' experience in a similar role
* Knowledge of MS Office Suite (Word, Excel, Outlook, PowerPoint) – Advanced

**Reporting**

A Complaint Officer must always perform their duties in line with the organisation's policy and procedures, service standards and code of practice. They should operate within their level of authority and responsibilities.

Where they recognise that or is unsure about whether the task falls in their scope of authority, they should immediately consult the Customer Service Team Leader.

If the Team Leader is not available, customer service officers should report to the Customer Service Manager.

**Team Charter**

|  |  |
| --- | --- |
| **Team purpose** | * The purpose of the Customer Services team is to provide exceptional customer service to the Australian Hardware clients. * Our vision it to always find innovative ways to serve our customers. * Our objectives are: * To respond to enquiries timely, correctly and consistently * To make our clients feel that the company values them * To be an ambassador for quality customer service for Australian Hardware * To be brand ambassadors for Australian Hardware company * To contribute to sales increase according to the Australian Hardware's operational plan for the department * To complete all tasks within set deadlines and according to company's standards |
| **Team members** | Taylor Smith (You) – Customer Service Team Leader  Sarah White – Customer Service Officer  Mark Black – Customer Service Officer  Joanne Brown – Complaint Officer |
| **Team values** | Our team values are:   * Accountability * Integrity * Customer focus * Quality first * Respect for diversity * Collaboration * Innovation * Engagement |
| **Group norms** | Our group norms (excerpt as an example) are:   * We meet every day for 15 minutes for a stand-up meeting to discuss the tasks of the day. This is an opportunity to share our workload. * Lunch breaks are taken in turns and may vary depending on how busy the phones are. Lunch breaks must be taken between 11 am and 2 pm. * Lunch has to be consumed in the kitchen area. * Customer Service area should always be covered. * Team members must complete their daily tasks first and then any additional tasks assigned to them in order of urgency. |
| **Metrics of success** | Metrics of success for individual roles are stated in the performance plan for each member.  The team's metrics are as follows:   * All enquiries responded to within 24 hours (working day) * Feedback from clients to average 95% in positive feedback * All tasks assigned to team members to be completed according to timelines |
| **Resources** | * Desktop * Microsoft Office suite * Access to CRM * Access to social media platform and website as relevant to roles * Ergonomic furniture and equipment * Stationary * A monthly budget of $500 for professional development |

# **Appendix 2 – Current Team Performance**

According to the Customer Service Manager, the following team's Metrics of Success have not been achieved in the last month:

| **Metrics of Success** | **Last Month Result** |
| --- | --- |
| All enquiries responded to within 24 hours (working day) | Enquiries responded within three working days |
| Feedback from clients to average 95% in positive feedback | 50% of positive feedback from clients |
| All tasks assigned to team members to be completed according to timelines | 75% of the tasks are completed on time |

In a brief meeting, your team identified the following factors that are affecting their performance:

* Sarah, one of your customer service officers, has poor organisational and prioritisation skills. This is creating work-overload for her, and a bottleneck of clients' enquiries received via email.
* The whole team has low-stress tolerance, making the communication with clients confusing, slow and inconsistent.
* Lack of work-life balance in the customer service department.
* The Customer Relationships Management system does not interface with the finance software so the purchase data must be reported to finance, creating additional work.
* Customer complaints are up 20% from last month.

**Team Background**

|  |  |
| --- | --- |
| **Team Member** | **Personal Features** |
| Sarah White – Customer service officer | * Age: 23 years old * Mother tongue: Mandarin * English skills:   + Listening – Medium   + Speaking – Medium Low * Introvert, shy, friendly, smart * Low organisational and prioritisation skills * Studying at Uni, she juggles work and study |
| Mark Black – Customer Service Officer | * Age: 35 years old * Mother tongue: French * English skills:   + Listening – Advanced   + Speaking – Advanced * Confident, empathetic, intelligent, frank * Hard- worker and supportive * Brings many ideas to the table but does not take the initiative to implement them |
| Joanne Brown – Complaint Officer | * Age: 30 years old * Mother tongue: English * Conservative, smart, dominant, results-oriented * Efficient and organised * She is currently seconded to the Finance Team, but she still works on the complaints from the Customer Service Team |

# 

# **Appendix 3 – Individual Performance Issues**

Sarah's performance has dropped considerably. Additionally to the information provided about Sarah in Appendix 2, you have received the following email from the Customer Service Manager:

**To:** Team Leader Customer Service < Team Leader Customer Service @astralianhardware.com.au>

**Cc:** HR **<**hr@ astralianhardware.com.au >

**From:** Customer Service Manager **<**CSM@ astralianhardware.com.au >

**Date:** DD/MM/YYYY

**Subject:** Sarah White Performance issues

**Attachments:** NA

Hi ….,

I know we've touched base about this informally in the past, but I feel like it is necessary to escalate the issue.

I am having severe concerns over Sarah's recent behaviour. Over the past couple of months, her customer service standards have been slipping; on more than one occasion, I've overheard her snapping at our customers. I know that you have already had an informal counselling session with her, and when you discussed the situation, she had an excuse as to why she was short and promised she would work harder on controlling her temper. Given her initial performance record during the probation period, you gave her the benefit of the doubt.

From your recent team performance report, I also see that she has struggled with punctuality. As you know, we have a flexible work culture, and I'm happy for my teams to set their hours, but she seems to have taken it too far. It looks like the situation speaks to a larger pattern of behaviour.

I would advise starting a formal performance management intervention as soon as possible,

Please investigate if something is going on in her personal life that's affecting her professional performance, she is a good customer service officer, and we are here for her.

Please keep me posted,

Kind regards,

Customer Service Manager