

Assessment

**Task 2**

**Develop personal work priorities**

**BSBPEF402**



**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** **Completed successfully****Did the student satisfactorily:** | **Comments** | **Y** | **N** | **DNS** |
| --- | --- | --- | --- | --- |
| The student has satisfactorily completed and submitted the following:* Workplan in Task 2.1A
* Team Meeting in Task 2.1A
* Summary of discussion in Task 2.1A
* Table outlining plan to overcome barriers for performance in Task 2.1B
* Screenshot showing personal work schedule in Task 2.1B
* Email to manager in Task 2.1C
* Survey developed in Task 2.2A
* Feedback analysis in Task 2.2B
* Evaluation and reflection in Task 2.2C
* Screenshot of revised work schedule in Task 2.2D
* Email to manager in Task 2.2D
 |  | [ ]  | [ ]  | [ ]  |
| Demonstrated ability to:* Identify task requirements
* Identify own accountabilities in line with task requirements

This is evidenced by:* Workplan in Task 2.1A
* Team Meeting in Task 2.1A
* Summary of discussion in Task 2.1A
 |  | [ ]  | [ ]  | [ ]  |
| Demonstrated ability to:* Assess barriers for performance of personal accountabilities
* Develop a personal work schedule

This is evidenced by:* Table outlining plan to overcome barriers for performance in Task 2.1B
* Screenshot showing personal work schedule in Task 2.1B
 |  | [ ]  | [ ]  | [ ]  |
| Demonstrated ability to:* Communicate personal work schedule to relevant personnel
* Monitor own performance according to personal work schedule
* Document variations between expected and actual work performance according to task requirements and communicate to relevant personnel

This is evidenced by:* Email to manager in Task 2.1C
 |  | [ ]  | [ ]  | [ ]  |
| Demonstrated ability to:* Seek and evaluate feedback from relevant stakeholders on own work performance

This is evidenced by:* Survey developed in Task 2.2A
* Feedback analysis in Task 2.2B
 |  | [ ]  | [ ]  | [ ]  |
| Demonstrated ability to:* Analyse variations between expected and actual work performance

This is evidenced by:* Evaluation and reflection in Task 2.2C
 |  | [ ]  | [ ]  | [ ]  |
| Demonstrated ability to:* Update personal work schedule according to internal and external feedback and changes in circumstances

This is evidenced by:* Screenshot of revised work schedule in Task 2.2D
* Email to manager in Task 2.2D
 |  | [ ]  | [ ]  | [ ]  |
| 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 requirements of this task. |  | [ ]  | [ ]  | [ ]  |
| **Task Outcome: Satisfactory** [ ]  **Not Yet Satisfactory** [ ]  |
| **Student Name:** |
| **Assessor Name**:**Assessor Signature:****Date:** |

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# **Task 2 – Develop personal work priorities**

| **Task summary and instructions** |
| --- |
| **What is this assessment task about?** | You are a Customer Service Team Leader at Australian Hardware Company. You are required to prioritise your work plan, schedule work activities for your team based on their feedback and arrange a set of professional activities to help with their personal and professional development.To complete this task, please refer to Appendix 1,2,3 and 4 at the end of this document.This task comprises of the following assessment methods:* Product-based [x]
* Direct observation of Role-Play [x]
* Case Study [ ]
* Other (specify) [ ]

It has been designed to evaluate your ability to/competency in:* Identify task requirements
* Identify own accountabilities in line with task requirements
* Assess barriers for performance of personal accountabilities
* Develop a personal work schedule
* Communicate personal work schedule to relevant personnel
* Monitor own performance according to personal work schedule
* Document variations between expected and actual work performance according to task requirements and communicate to relevant personnel
* Seek and evaluate feedback from relevant stakeholders on own work performance
* Analyse variations between expected and actual work performance
* Update personal work schedule according to internal and external feedback and changes in circumstances

Your assessor will be looking for demonstrated evidence of your competency in the above.You are required to address the following:**Task 2.1 Plan and complete own work schedule:*** Develop work plans in consultation with the team
* Develop a personal work schedule
* Write email to manager regarding work schedule

**Task 2.2 Implement and review own work schedule:*** Create a feedback survey
* Analyse the feedback
* Analyse variations between expected and actual work performance
* Revise work schedule based on feedback and evaluation
* Report on operational performance

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:*** Team meeting regarding work plans

**You must submit to GOALS*** Workplan
* Summary of discussion
* Table outlining plan to overcome barriers for performance
* Screenshot showing personal work schedule
* Email to manager regarding personal work schedule
* Feedback survey
* Feedback analysis
* Evaluation and reflection
* Screenshot of revised work schedule
* Email to manager regarding performance
 |
| **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 Plan personal work schedule**

Read Scenario provided in **Appendix 1 and 2.**

1. **Workplan**

As a Customer Service Team Leader, you have been asked by your manager to create a work plan for yourself and your team members.

Consider:

* The workload
* The content and purpose of each task
* Work objectives
* Available resources
* The available technology
* Operational needs
* Team Charter with guidelines (see Appendix 3)

After allocating tasks to each person, participate in a **meeting** with your team to discuss:

* detailed performance plan for each employee
* team policy and procedures
* operational performance issues identified by the Customer Service Manager (Appendix 1)
* consider the team background and charter in the discussion

Schedule a time with the trainer and assessor in **week 2** of class to perform the role play (meeting) with a group of students who will play the role of the team members (3-4 students recommended to resemble the team, meeting time: 20 – 30 minutes).

The trainer and assessor will evaluate your performance during the role play and give you feedback in the marking guide.

If you are absent from class, it is your responsibility to make alternative arrangements with the trainer and assessor to perform the Role-Play.

**Before the meeting**

* Develop a work plan for the team (Template 1)

**During the meeting**

* Discuss the work plan with the team
* Address the operational performance issues identified by the Customer Service Manager (Appendix 1)
* Identify barriers to the achievement of work objectives and priorities
* Consider the team background and charter in the discussion
* Determine solutions (contingencies) to address obstacles and issues
* Determine how to incorporate the contingencies into the work plan
* Take notes during the meeting about the topics discussed

**After the meeting**

* **Record the notes** taken during the meeting in the table provided (Template 2)
* The trainer and assessor will validate your active participation in the meeting as instructed. Comments on your performance will be recorded in the marking sheet.
* Develop the work plan using Template 1 as a sample and **create the work plan in Excel**. Excel is the software used to monitor operational performance in the company.
* Attach the work plan in excel to your submission

Assign tasks to individual team members. Use Template 1.

Use the following:

* **R**= responsible (who performs the task)
* **S**= support (who provides support for the task)
* **E**= escalation (when a task needs to be escalated up to supervisor for resolution)

**Template 1 –Work Plan**

| **Task/Function** | **Sarah** | **Mark** | **Joanne** | **Taylor****(TL)** |
| --- | --- | --- | --- | --- |
| Respond to clients’ enquiries |  |  |  |  |
| Organise work plans |  |  |  |  |
| Provide admin support  |  |  |  |  |
| Open and close office |  |  |  |  |
| Meet and greet clients  |  |  |  |  |
| Respond to customer enquiries (phone, email, face-to-face) |  |  |  |  |
| Manage customer complaints |  |  |  |  |
| Information management and record-keeping |  |  |  |  |
| Facilitate a weekly meeting with staff |  |  |  |  |
| Monitor operational performance |  |  |  |  |
| Organise training for the team |  |  |  |  |
| The first point of contact for complaint |  |  |  |  |
| Sell the products |  |  |  |  |
| Meeting with key customers  |  |  |  |  |
| Report to the Customer Service Manager |  |  |  |  |
| Monitor and evaluate the accuracy of information management and record-keeping system |  |  |  |  |

**Template 2 –Summary of discussion**

**Summarise** your discussion in the table below.

| **Summary of Discussion** |
| --- |
| **Work plans**What does the team think about the work plan? Are they clear about task allocation? What is their feedback? Have you changed anything in the work plan based on the feedback?(40-80 words) |  |
| **Priorities**What are the work priorities for the team?(3-4) |  |
| **Operational Issues**Summary of the discussion on the operational issues.(40-80 words) |  |
| **Contingency**Determine the contingency for each issue (4-6) that has been identified and outline how it will be incorporated into the workplan. | **Issue** | **Contingency** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Schedule**Schedule work objectives (4-5). | **Work objective** | **Schedule** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

1. **Personal schedule**

After the meeting, all team members are now clear about their day to day tasks at work and team priorities.

The Customer Service Manager asked everyone in the team to create a personalised weekly calendar with work and personal commitments. The team members will use the calendar to better plan their work and achieve work-life balance.

Team members are required to create a **digital calendar** (Outlook, Gmail calendar, or other) to incorporate work objectives into personal schedules and responsibility.

Make a list of at least three barriers that may affect your performance of your personal accountabilities, and explain how you will address each of them in the template below.

**Template 3 – Barriers for Performance**

| **Barriers** | **Plan to overcome barriers (40 – 50 words per barrier)**  |
| --- | --- |
|  |  |
|  |  |
|  |  |

Develop a work schedule that includes all the tasks and responsibilities you must undertake as team leader. Take a screenshot of the weekly digital planner and paste it in the space below.

|  |
| --- |
|  |

1. Write an email to the Customer Service Manager, with a copy of your work schedule attached, where you:
* Summarise the work schedule
* Explain your reasoning in developing the schedule and how it will enable you to overcome the barriers to performance that you have identified
* Explain how you will monitor your own performance according to the personal work schedule
* Explain how you will document variations between expected and actual work performance

Use the template below to write the email.

Note: you don’t need to send the email, just write the email using Template 4. (80 – 100 words)

**Template 4 -** **Email**

|  |
| --- |
| Email to Customer Service Manager |
| **To**: |
| **Cc**: |
| **Bcc**: |
| **Subject**: |
| **Date email is sent**: |
| **Attachments**: |
|  |

## **Task 2.2 Implement and review work schedule**

It is good practice to identify personal and professional performance through self-assessment and feedback from others on the achievement of work objectives.

**A)** **Create a survey**

Create a 3 questions feedback survey that could be sent to the team members to evaluate your performance as a team leader.

Focus on:

* Clarity of communication
* Leadership style
* Support to team members

Copy and paste the three questions below:

|  |
| --- |
|  |

**B)** **Analyse feedback**

You have received anonymous feedback from the team. A summary of the qualitative feedback is provided below:

|  |  |
| --- | --- |
| **Clarity of communication** | * Taylor communicates clearly
* Sometimes I don’t fully understand the tasks that are given to me, but I don’t ask questions about it
* Taylor should organise a one to one meeting before performance reviews to prepare us for the review
 |
| **Leadership**  | * I do feel included in decision making
* I do not feel supported with my issues
* I feel my team leader is inflexible with work hours
* Work Life balance is not considered
 |
| **Support to team members** | * Work schedule on the board would be helpful
* Monthly team lunch arrangements would be nice
* Inbox management can reduce the pressure on one person
 |

You have also received the following feedback from clients:

|  |  |
| --- | --- |
| **Client 1** | I had to wait for 3 days to hear back about stock availability. I believe this is a long wait for an order.The customer service officer told me that she was escalating my enquiry to her Team Leader. |
| **Client 2** | I am satisfied with the outcome of my complaint. The solution was great. Thank you! |
| **Client 3** | My order was pending for approval for 3 days, and the reason was not communicated to me. I had to follow it up myself, and wait for the answer. This is not acceptable for a regular customer. The customer service officer told me that they had a backlog of queries to reply to and that she asked the Team Leader to reply to me. |

You have received the following response to a survey sent out to the three team members as part of a 360 degrees feedback:

| The Team Leader | Never | Rarely | Sometimes | Often | Always | Don’t Know |
| --- | --- | --- | --- | --- | --- | --- |
| Has a high level of initiative and motivation to achieve goals |  |  |  | 2 | 1 |  |
| Is able to make tough decisions and exercise sound judgment |  |  |  | 3 |  |  |
| Follows up decisions and maintains a focus on priorities |  | 1 | 2 |  |  |  |
| Confronts problems directly and promptly |  |  | 2 | 1 |  |  |
| Is flexible in adapting approaches to new demands and unforeseen circumstances. |  | 1 | 2 |  |  |  |

| **The Team Leader** | Never | Rarely | Sometimes | Often | Always | Don’t know |
| --- | --- | --- | --- | --- | --- | --- |
| Develops and sustains productive relationships with key external stakeholders nationally and internationally where appropriate |  |  |  |  | 3 |  |
| Is able to identify, critically assess and seize opportunities for strategic partnerships |  |  |  |  | 2 | 1 |
| Builds collaborative relationships within the company and promotes cooperative activity across functional/structural boundaries |  |  |  | 1 | 2 |  |
| Effectively markets and promotes the company’s values, programs and activities. |  |  |  |  | 3 |  |

**Analyse the feedback**.

Determine:

* Issues
* Areas of concern
* Whether you are meeting your work performance objectives
* Whether you are meeting organisational standards

(100-150 words)

Document your analysis in the space below.

|  |
| --- |
|  |

1. **Evaluation and reflection**

The Customer Service Manager requires you to develop a self-assessment report based on feedback and reflection to present during your biannual performance management meeting.

Complete the self-assessment.

**Self-assessment**

Address the following:

* Are you meeting your work objectives or targets? Explain your answer.
* Are you complying with the standards expected in your work? Explain your answer.
* Does the feedback reveal any issues or areas of concern?
* In what areas of your work as a team leader at Australian Hardware Company could you improve your performance? Explain your answer.

(50-100 words)

|  |
| --- |
|  |

1. **Reporting**

Revise the personal work schedule you developed in Task 2.1B to address the issues raised by feedback, reflection, team performance and any other change in circumstances. Paste a screenshot of the revised work schedule in the space provided below.

|  |
| --- |
|  |

Write an email to the Customer Service Manager, with a copy of your new work schedule attached, where you:

* Summarise the improvements and issues identified
* Mention what improvements will be prioritised and implemented to achieve the metrics of success
* Explain the changes you have made to your work schedule and why

Use the template below to write the email.

Note: you don’t need to send the email, just write the email using Template 5. (40-80 words)

**Template 5 -** **Email**

|  |
| --- |
| Email to Customer Service Manager |
| **To**: |
| **Cc**: |
| **Bcc**: |
| **Subject**: |
| **Date email is sent**: |
| **Attachments**: |
|  |

# **Appendix 1 – Scenario**

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.

As part of your job you are required to create a work plan for your team, a description of team member’s roles and responsibilities, contingency measures, work schedule and record of adjustments made during implementation/completion.

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

The customer service team at Australian Hardware has been working together for a few months now to deliver higher quality of customer service according to current strategic plan.

The team comprises of:

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

As a Customer Service Team Leader, you have been assigned a task to create a new work plan, for your team and help them to achieve their KPIs.

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 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. Where a Team Leader recognises that or is unsure about 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**

Complaint Handling Officer is responsible to ensure that 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.

# **Appendix 2 – 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 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 – 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 LeaderSarah White – Customer Service OfficerMark Black – Customer Service OfficerJoanne 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 4 – Professional Development Opportunities**

Areas of Professional Development in the current financial year:

* Speed up response times
* Be an accountability partner with your customer
* Resolve common support issues in real-time