



UNIT - 3



*Communicate
in the
Workplace*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required for effective communication with customers and other staff in the workplace. It involves establishing contact with customers, processing information, working in a team, maintaining personal presentation, following routine instructions, and reading and interpreting retail documents.

Application of the Unit

This unit relates to frontline service staff and supervisors. It requires the team member to demonstrate the ability to select and use verbal and non-verbal communication techniques to interact with colleagues and customers in a positive and inclusive manner, and to interpret and generate workplace information in a variety of formats.

Elements and Performance Criteria

| Element | Performance Criteria |
|-----------------------------------|---|
| 1. English contact with customers | 1.1 Maintain a welcoming customer environment 1.2 Greet customer warmly according to store policy and procedures 1.3 Create effective service environment through verbal and non-verbal interaction according to store policy and procedures 1.4 Use questioning and active listening to determine customer needs 1.5 Demonstrate confidentiality and tact |
| 2. Process information. | 2.1 Answer telephone according to store procedures 2.2 Use questioning and active listening to identify caller and accurately establish and confirm requirements 2.3 Use telephone system functions according to instructions 2.4 Record and promptly pass on messages or information 2.5 Inform customer of any problems and relevant action being taken 2.6 Perform follow-up action as necessary |

| | |
|--|---|
| 3. Communicate with customers and colleagues from diverse backgrounds. | <p>3.1 Value and treat with respect and sensitivity customers and colleagues from different cultural groups.</p> <p>3.2 Consider cultural differences in all verbal and non-verbal communication</p> <p>3.3 Use gestures or simple words to communicate where language barriers exist</p> <p>3.4 Obtain assistance from colleagues or supervisors when required</p> |
| 4. Work in a team. | <p>4.1 Demonstrate a courteous and helpful manner at all times</p> <p>4.2 Complete allocated tasks willingly according to set timeframes</p> <p>4.3 Actively seek or provide assistance by approaching other team members when difficulties arise</p> <p>4.4 Identify lines of communication with supervisors and peers according to store policy</p> <p>4.5 Encourage, acknowledge and act upon constructive feedback provided by other team members</p> <p>4.6 Use questioning to minimise misunderstandings</p> <p>4.7 Identify and avoid signs of potential workplace conflict wherever possible</p> <p>4.8 Demonstrate participation in team problem solving</p> |
| 5. Read and interpret retail documents. | <p>5.1 List and describe a range of retail documents</p> <p>5.2 Read and interpret information from a range of retail documents</p> |

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

The following skills must be assessed as part of this unit:

- demonstrated use of positive and inclusive language
- questioning and listening
- resolving conflict
- negotiating
- managing stress
- demonstrating self-esteem



- literacy skills in regard to reading and understanding workplace documentation, such as store policies and procedures and retail documents.

The following knowledge must be assessed as part of this unit:

- store policy and procedures in regard to
 - internal and external customer contact
 - verbal and non-verbal presentation
 - code of conduct
 - allocated duties and responsibilities
- goods and services provided by the store
- location of store departments
- functions and procedures for operating telephones and other communication equipment.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

| | |
|---|--|
| <i>Customers</i> may include: | • new or repeat contacts |
| | • internal and external contacts |
| | • customers with routine or special requests |
| | • people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities. |
| <i>Store policy and procedures</i> may relate to: | • contact with customers |
| | • job descriptions and responsibilities |
| | • interaction with other team members |
| | • interaction with supervision and management |
| | • induction process |
| <i>Verbal and non-verbal interaction</i> may occur with: | • external customers |
| | • internal contacts, including management and other team members |

| | |
|--|--|
| Questioning may involve the following communication techniques: | • using open and inclusive language |
| | • speaking clearly and concisely |
| | • using appropriate language |
| | • non-verbal communication |
| Information may include: | • telephone |
| | • written |
| | • electronic media such as email |
| | • verbal feedback |
| | • observation |
| Colleagues may include | • management |
| | • other staff members |
| | • full-time, part-time, casual or contract staff |
| Verbal and non-verbal communication may include: | • speaking and listening |
| | • reading and writing |
| | • body language |
| | • facial expression |
| Teams may include: | • small work teams |
| | • store team |
| | • corporate team |
| Problem solving may be affected by: | • store policy and procedures |
| | • resource implications |
| Retail documents may include: | • stock sheets |
| | • planograms |
| | • timetables, staff record forms |
| | • lay-by slips |
| | • credit slips |
| | • project return slips |
| | • manufacturer instructions |
| | • telephone message pads |



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Section A: Establish contact with customers

The four steps to establishing contact with customers are:

Step 1: The communication process

Step 2: Verbal communication

Step 3: Listening

Step 4: Non-verbal communication

Step 1: The communication process

Find information

There may be resources that will help you with the following learning activities.

Ask your Teacher to help you find additional information on communication skills.

Introduction

Imagine you have overheard a discussion at work about yourself. Someone says ‘Have you noticed [your name]? They get on with anyone and everyone; leave the customers smiling, great in a work team. They even handled the boss in the Christmas rush. That was a good appointment?’ What the speaker is really saying about you is that you are a good communicator. Good communication is a highly prized ability; one which enhances all stages of a person’s working life. Employers in all industries rank it at the top when asked what they want in an ideal employee.

This is why it is vital to you personally, as well as to your workplace that you communicate with customers and your colleagues in effective ways. Use this unit to check that your communications skills are up to date and to learn new ones. Communication is about messages. A message is sent and received. Unless both processes take place, communication does not happen. A message can be communicated in many different ways. The way the message is sent is called its channel of communication.

Communication channels can be:

- **Verbal** (i.e. using words): Verbal communication is either spoken or written
- **Non-verbal:** Non-verbal communication is either visual or uses body language



Channels of communication



Spoken



Written



Visual



Body language

Learning and Practical Activity A1.1: Channels of communication

Add your own examples of the four types of communication channels.

Verbal: Spoken

- Speaking to a customer
- Talking on the phone

Verbal: Written

- A memo at work
- A letter to a friend overseas
- Symbols on T-shirts
- Balloons outside a home to show where a party or garage sale is being held

Non-verbal: Body Language

- an angry face
 - a winning athlete making a V for victory sign
-
-

Think about it!

Some messages involve more than one of these four. What channels of communication are used when a store advertises its Annual Sale on television?

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Suggested answers are in the end in the section Learning Activities:

Effective and Ineffective communication

Communication seems simple enough. All you have to do is use one or more of the four channels clearly and competently and at the right time and place. Then everyone should understand each other perfectly – right?

Wrong! Unfortunately communication is not always as successful as the communicators intend. The message may not be sent appropriately or received properly. There may be barriers to communication.

One common barrier is thinking that communication means only sending out the message. Receiving the message is just as important. This means listening if the message is spoken, reading if the message is written and noticing if the message is non-verbal.

In the worst cases, communication can break down altogether. Some court cases, accidents, divorces, business losses, even wars can be traced back to very poor communications.

Learning and Practical Activity A1.2: Effective communication

In this learning activity you are going to find out what other people mean by effective communication. Asking others whose opinions you trust is a quick way to discover what good communication techniques are.

Ask as many people as you like.

Include the views of yourself and your Teacher.

Keep a list of the qualities these good communicators have and write them in the space below.

An outstanding communicator

.....

.....

Good Communication Checklist

Did you find any of these qualities on your list? Add them if they are not already there.

- Speak clearly at the right pace, not too fast or slow
- Check that the person has understood you
- Ask questions to check your own understanding
- Don't blame others for not understanding you
- Be a good listener and be patient
- Smile and use other positive, friendly expressions
- Have appropriate personal presentation and body language for the situation
- Use appropriate level of language for the listener
- Be open and straightforward
- Accept others as they are, without judgment
- Use humor appropriately
- Admit mistakes
- State clearly what you want without being complicated
- Don't confuse by giving too much information at once
- Write/speak clearly, for a clear purpose
- Choose the right medium for the purpose (e.g. don't phone if a letter or fax would be better)
- Have a pleasant sounding voice

- Have something worthwhile to communicate
- Know when to be quiet
- Be flexible, prepared to change your position

Learning and Practical Activity A1.3: You as a communicator

What sort of communicator are you? In this learning activity you are asked to concentrate on yourself as a communicator – as a sender and receiver of messages.

1. What situations in your life need good communication skills?

(Think of both your home and work life in your answer.)

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2. List your strengths as a communicator:

.....

.....

3. List the improvements you could make in how you communicate:

.....

.....

Step 2: Verbal communication

This step contains techniques which will improve your verbal communication skills. Techniques to improve written skills which you need to work in the retail industry will be dealt with in later units.

Learning and Practical activity A2.1: Identifying good verbal communication skills

1. Read the list below and tick the tips that you use now.

| Tips for Better Speaking | Tick |
|--|--------------------------|
| Think and plan before you speak if possible. | <input type="checkbox"/> |
| Try to find a good way of starting off. Clear and straightforward is best. | <input type="checkbox"/> |

| Tips for Better Speaking | Tick |
|--|--------------------------|
| A 'heavy' tone puts up barriers immediately. A light and joking tone is not always appropriate either. | <input type="checkbox"/> |
| Stick to the point. | <input type="checkbox"/> |
| Don't blame people for not understanding you. | <input type="checkbox"/> |
| Say what you want in short clear 'chunks'. | <input type="checkbox"/> |
| Don't communicate your assumptions and prejudices. For example, don't assume that because a person is older, that they can't hear. | <input type="checkbox"/> |
| Give and get feedback. You could say things like 'Does that seem to make sense?' or 'Have I got that right?' | <input type="checkbox"/> |
| Avoid double meanings or unclear messages. | <input type="checkbox"/> |
| Allow the listener to speak too. | <input type="checkbox"/> |
| Use words and concepts the listener will understand. Don't use complicated language or vocabulary to impress. | <input type="checkbox"/> |
| Watch for the listener's body language. Does the listener seem to be bored, confused, trying to get a word in too? | <input type="checkbox"/> |

2. Read this conversation between a sales assistant and a customer and then place a tick next to the statements you agree with about the assistant's communication skills.

| Scene: the local supermarket | |
|------------------------------|---|
| Customer: | Excuse me. Do you work here? |
| Assistant | Yes. Can I help you? (smiling): |
| Customer: | I'm trying to make an old recipe of my grandmother's for plum pudding. Can you help me? |
| Assistant: | Sure, be glad to. Sounds like fun. What can't you find? |

| | |
|-------------------|--|
| Customer: | I was just about to give up and go somewhere smaller. I've been around all the aisles about four times and I can't see the sugar or the lard or dried fruit. And do you have brandy? And cake tins? Do you carry kitchenware? Oh and baking powder and breadcrumbs – that's the secret. |
| Assistant: | Let's tackle these one at a time. There's a whole section with ingredients for cakes and baking. Let's try it. Aisle five. Here we are. You'll find everything here except the lard. That's in the butchery – see where I'm pointing? The lard's on the right. I've forgotten something. What else did you need? |
| Customer: | Brandy? |
| Assistant: | Of course. Imagine plum pudding without the brandy. You'll have to go next door to the bottle shop. Go through the checkout first. |
| Customer: | Hope I get it all. |
| Assistant: | I'll be in Aisle 2 where I was before. Come and get me if you need me. Anything else I can do for you now? |
| Customer: | Not now thanks. But it's such a relief to get some help. No one takes any notice of you in supermarkets these days. |
| Assistant: | Not here! Customer Service is the most important part of our job. Anyway how else could I get a new recipe for plum pudding? |

How did the assistant communicate?

Tick the statements below that you agree with:

| Statement | Tick |
|--|--------------------------|
| • He was friendly | <input type="checkbox"/> |
| • His tone was personal but not offensive | <input type="checkbox"/> |
| • He checked with questions that the customer had got everything | <input type="checkbox"/> |
| • He offered service immediately | <input type="checkbox"/> |
| • He divided up the shopping list into bits and checked that each bit could be found. This was done verbally, not just in his head. In this way the customer understood what was happening | <input type="checkbox"/> |
| • He checked that the customer felt comfortable about being left | <input type="checkbox"/> |



Every statement should have a tick. The assistant's verbal communication was excellent.

Learning and Practical activity A2.2: Planning how to speak to the manager

Sheree wants to speak to her manager about something that has been niggling at her for weeks. She believes she has been paid at the wrong rate and is receiving less each pay period than she should be. She calculates that, over the months, it has amounted to quite a sum of money.

- Help Sheree plan how she will speak to her manager.
- Make notes under the headings on the next page.
- Use the Tips at the beginning of this step to guide your answers.
- After you have completed your answers, have a look at the suggestions in the 'answer section' at the back of this guide.

1. Plan when and where to speak

What is the best time and place for Sheree to speak to the manager?

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Should she make a formal appointment or wait for a casual meeting?

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2. Collect information which supports her claim

What information about her pay could Sheree collect before she speaks to her manager?

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3. Plan how to start speaking

Write out the first few sentences in which Sheree could introduce the issue to her manager.

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Describe the tone of voice she should use.

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4. Plan what to do in the case of three possible outcomes

Sheree's manager listens and says nothing. After she has finished all she wants to say, the manager says 'Okay I'll think about it and get back to you.' Write down the main points she should cover if her manager gave her an uninterrupted hearing.

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The manager hears Sheree's introduction and starts to argue with her immediately, saying things like 'I am sick of employees moaning about their pay and doing as little as possible to earn it' and 'I don't want to know about this. Get back to work'. Write down the main points she should cover.

.....

.....

The manager listens for a short while then interrupts and tries to sidestep the issue, saying things like 'Look, I'm just too busy now. Catch me another time when things are less hectic'. Write down the main points she should cover.

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Step 3: Listening

Good listening is as important as good speaking. Without it there is no effective communication. Here are a few tips on how to improve your listening skills.

Tips for better listening

- Concentrate on what is being said by giving the speaker full attention
- Encourage the speaker by asking appropriate questions
- Help a poor speaker along. Ask questions. Be enthusiastic, responsive and kind
- At the end, check that you have understood by stating in a summary what you have heard



- If you have further business, state what you intend to do as a result of this conversation
- If the speaker is rambling and dull and it is impossible to stay focused on what is being said, interrupt politely and ask a question which brings the speaker back onto the topic
- Communicate interest through your body language (more in Step 4)
- Dismiss any prejudices you might have about the speaker. Concentrate on the person, not the haircut or clothing.
- If it is appropriate, take notes while you are being instructed
- End the encounter appropriately.

Learning and Practical activity A3.1: Closed and open questions

By now you will understand that listening is not a passive activity. Listening also means understanding. You could listen to a customer with complete attention and still not understand what s/he wants. This is why you have to ask questions when you listen: to make sure you get the complete story of what a customer wants.

There are two sorts of questions: **closed** and **open**.

1. Closed Questions

Closed questions receive only a yes or no answer. They are useful to get a limited amount of information. They restrict the answers that someone can give.

These are closed questions:

- 'Do you like this colour?'
- 'Do you wish to lay-by?'

2. Open Questions

Open questions elicit more than a yes or no answer. They begin with words like:

- How?
- When?
- Where?
- Why?
- What?

They are good questions to use when you want to find out information. Open questions also help find out what the customer needs. Here are some open questions:

- 'What would you use a new car for?'

- 'What are the soil conditions like where you want to plant these spring flowers?'

Write a **closed** question that you might ask a customer.

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Write an **open** question that you might ask a customer.

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Learning and Practical activity A3.2: How well did you listen?

In this learning activity, you are going to practice being a good listener. Ask your Teacher to speak to you for about five minutes about some topic. Alternatively, they might read you something from an article or magazine. Before you ask, read over the tips for good listening in the box at the beginning of this step. Remember that good listening involves asking questions. Don't be afraid to interrupt politely if you don't understand. In this learning activity, it is up to you to make sure you receive the message. After you have listened, you are going to repeat as much of what the Teacher has said as possible. Then the Teacher will assess how well you listened.

Assessment

Ask your Teacher to circle the number beside the answer which best describes how well you listened.

How well were you listened to?

1. How interested did your trainee seem?
 - Genuinely interested. I felt s/he really wanted to know.
 - Interested.
 - Not interested but not disinterested.
 - Didn't seem to care at all.
 - My trainee fell asleep while I was speaking.
2. Did your trainee ask questions if s/he didn't understand what you were saying?
 - Yes
 - No but it wasn't necessary anyway.



- No. S/he would have understood more if s/he had asked some questions.
 - My trainee didn't utter a squeak. I forgot s/he was there.
3. How accurately did your trainee repeat back to you what you said to her/him (in other words, how well did the trainee show s/he understood you?)
- Almost complete accuracy.
 - Very accurate.
 - A fair degree of accuracy.
 - Understood less than half of what I said.
 - I may as well have been talking to the wall.
4. As a total impression how do you rate your trainee's listening skills?
- Wow!
 - Good.
 - I'm impressed.
 - I'll help her/him some more.
 - Oh dear!

Step 4: Nonverbal communication

At the beginning of this section we divided non-verbal communication into two types: visual symbols and communication through body language. If you need to refresh your understanding of them, go back to the beginning of this section. At the beginning of this section we divided non-verbal communication into two types: visual symbols and communication through body language. If you need to refresh your understanding of them, go back to the beginning of this section.

Learning and Practical Activity A4.1: Visual symbols

Visual symbols communicate by representing or standing for something else. In the modern world, with so much contact between countries, symbols are very important. We don't share language but the whole world can share pictures and symbols. This is a good shorthand way of communicating something quickly and catching people's attention. Think about symbols that you see every day on your way to work, for example 'walk' or 'don't walk' lights at pedestrian crossings.

Make a list of other symbols you have observed.

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Why do you think these symbols are used as a way of communicating with you? Do they communicate well?

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For the rest of this learning activity, take this learner guide and a pencil to work.

In the space provided, draw or describe three symbols and/or logos that you can see at work. Underneath each one, write what it communicates and why it is used in a retail environment.

Three visual symbols

What to look for:

- Symbols and logos that communicate product brands
- Symbols that your company uses (does it have special signs over the cash registers or an information desk: its logo for instance?)



This symbol communicates:

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It is important in the retail environment because:

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This symbol communicates:

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It is important in the retail environment because:

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.....

This symbol communicates:

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It is important in the retail environment because:

.....

.....

Learning and Practical Activity A4.2:Body language

Sometimes people are not aware of what their bodies are communicating. Look around you at work. What are other employees communicating with their bodies?

Can you see anyone:

- slouching (Sitting lazy and unattractive)?
- looking moody?
- showing signs of tiredness?
- looking pleased to be serving customers?

Sometimes people deliberately use their bodies to give messages. In fact, from earliest times people of all cultures have used parts of their bodies (mouths, eyes, arms and hands in particular) for communication purposes. When interpreting their communications, however, we should be aware that individual cultures or groups use gestures and expressions in different ways. This can lead to misunderstandings.

We are going to examine three aspects of body language: personal body space; facial expressions; and gestures (using hands, fingers and arms).

Personal Body Space



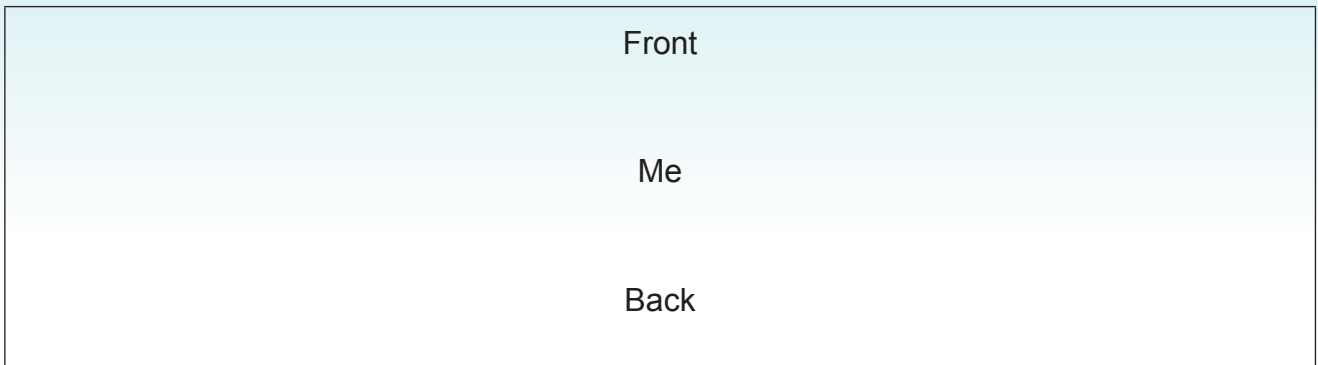
Adults feel uncomfortable when people stand too close. The area around us that we like to keep our own is like a moving bubble of personal space.

Like all body language, personal body space is complex. Here are some aspects of it:

- The personal space bubble is bigger behind than in front.
- People have different size personal space bubbles.
- Some Australians born overseas have smaller personal space bubbles than Australians born here. When two people from different cultures communicate, one can think the other is standing far too close and feel uncomfortable. Conversely, the other can feel treated in a 'stand-offish' way.
- In some situations we forget about body space. We can sit beside a stranger on a crowded bus with our arms touching and not mind. Though if anyone sat this close on an empty bus we'd move quick smart!
- We cannot think about what is being said when our body space is uncomfortable.
- Customers feel awkward if you invade their body space. Stand back if you sense you are too close. Move closer if you sense you are too far away.

Ask someone to walk slowly up to you from the front. Tell the person to stop when you say you are starting to feel uncomfortable. Measure (or guess) how far away the person is. Then ask them to do the same from behind and then from the side. Now draw a diagram with estimated measurements of your personal space bubble.

Diagram of my personal space



We don't all have the same body space boundaries. How can you tell what the limits are for individuals?

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Why is it important in the retail industry to respect an individual's personal body space? For example, what is the effect of standing too close to a person in a selling situation?

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What is the effect of standing too far away in a selling situation?

.....

Facial expressions

We are able to decode messages which facial expressions send fairly easily. For example, what does a smile to a customer show?

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Did you write any of these?

- Warmth
- Friendliness
- Shows you like someone

- Shows you want to get on with them
- Shows you are happy to serve them

Now think about this smile

The customer says:

I can't tell you what an awful time I've had with this appliance. It started an electric fire which burnt out much of my lounge room. I also suffered burns to my hands. I can't work because of my injuries.

The sales assistant listens attentively, smiling broadly the whole time.

What do you think the smile has communicated in this situation?

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The smile may communicate one of these messages:

- the sales assistant thinks the burns story is amusing
- the assistant is not listening properly and the smile is just a front
- the sales assistant is a bit odd.

None of these is the message that the customer wants to receive or the store wants to give. This example shows us:

- the power of body language in conveying messages
- the importance of using appropriate body language.

Gestures using hands, fingers and arms

Hands, fingers and arms can be communication channels for an entire language. The most complex is the sign language of deaf people. Sports referees use a simple sign language. Draw or describe what your hands would be doing to communicate the following messages:

| | |
|--------------------|--|
| It's over there | |
| Keep away. Danger! | |
| I don't know | |
| Goodbye | |
| Come over here | |
| Shhh, be quiet! | |

Why is it important to use effective hand messages in the retail industry?

Care with body language: The example of the handshake

Hand shaking is a European practice although people from all cultures have adopted it, particularly when doing business. Originally, the handshake showed that the person with his hand outstretched was not carrying a weapon: it was a sign of peace and goodwill. By this century it had come to signify a warm greeting, equality or agreement. Knowing when and with whom to shake hands can be confusing. Why do some men only offer to shake other men's hands while some women do not offer hands to shake at all?

When do you shake hands at work?

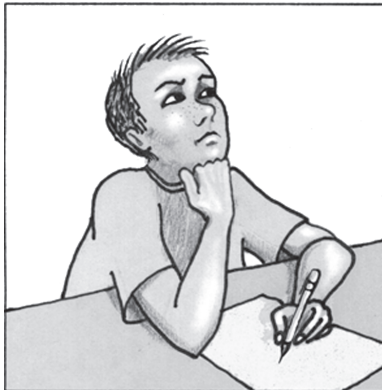
Who do you shake hands with at work?

What is the body language communicating in the pictures below and over the pages?

Write your answer under each picture.









Learning and Practical activity A4.3: Body language checklist

Why is effective body language so important in the retail industry?

Find Information

There are many resources available on Body Language. Ask your Teacher to help you access some useful information which will help you with the following learning activities. Use the space below to make a checklist of the tips which will help you communicate more effectively at work.

Effective non verbal communication at work: Checklist

Learning and Practical activity A4.4: Lines of communication

Communication lines at Susan's Gifts

Effective communication is achieved by communicating with the right person at the right time in the most effective way. When the line of communication is open and working, the message gets across without interruption. Choosing the most effective line is the sign of a good communicator. Below is a situation where Susan needs to select the most effective communication lines. It is Friday afternoon at 3:30 pm and Susan's Gift shop is remarkably



busy. There are eight people in her small shop, some are children and some are care givers. Susan has a casual member of staff helping her and a supplier showing some new stock.

A customer is waiting to be served, suddenly a bottle hits the floor, a baby cries and the phone rings.

Communication Line 1

Who will Susan need to talk to so that she sells some product?

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.....

Communication Line 2

Who will Susan need to talk to so that she establishes order in her shop?

.....

.....

Communication Line 3

Who will Susan need to talk to so that she encourages customers to come again?

.....

.....

What might interrupt each of the communication lines that Susan needs to establish?

.....

.....

Interrupted Communication Lines

| Communication Line | Might be interrupted by: |
|--------------------|--------------------------|
| 1 | |
| 2 | |
| 3 | |

Choosing the most effective communication line means that you need to stop and reflect on the need to communicate and plan your response. Your answers to the above activity show the lines of communication that Susan needs to establish.

Different communication lines are used for different reasons. For example, you will have an ongoing line of communication with your teacher about this unit at the same time as you have a line of communication with other people that you work with and with your customers. The essential thing is to *stop and think* so that your communication line is clear and is less likely to get interrupted.

In the box on the next page draw the communication lines which exist at your work. Write your name in the middle of the diagram and then draw a line to each person, or group of people, that you need to communicate with at work. Draw an unbroken line to show effective communication: communication where the message is sent and received clearly. Clear communication lines are like telephone lines because the message is sent and received and then a new message is sent.

Draw a broken line to show areas that the communication line could be improved (maybe you send messages clearly but don't receive a reply).

Communication Lines in my workplace



Discuss your communication lines with your teacher and seek ways to improve the effectiveness of each line.

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In Section B, you will build on the general communications work you began in Section A, thinking in a more focused way about your store and your customers.

Section B: Communicating in a retail environment

The two steps to communicating in a retail environment are:

Step 1: Knowing your customer: who is my customer

Step 2: Interacting with customers

Your store communicates before anyone speaks.



Introduction

From the moment customers walk in your door, your workplace is communicating with them. Let's see what messages they may be receiving.

Message 1: Communication about the store comes from visual and other sources

The first communication is non-verbal. The customer gets a general message from the layout of the store and its colours, signs, noises, aromas and 'atmosphere'. Ideally the message is one of welcome and the customer feels welcome and pleased to be there.

Message 2: The body language of the retail staff

Further communication takes place as the customer spends longer in the store.

Staff speak in body language long before they speak in words. Ideally their body language says they are waiting to help. Sometimes they communicate that the last thing they want to be bothered with is a customer. Or they might look so happy talking to each other that the

customer doesn't want to interrupt the party. Their clothes and personal presentations express a lot too. A strong impression of the store is created in the customer's mind.

Message 3: The verbal message

Finally the customer talks to a sales assistant. The assistant's verbal skills, both speaking and listening, are now needed.

Step 1: Who is my customer?

In the Introduction, the term 'customer' was used in its usual meaning of a person shopping in a store. However, there is a wider meaning used in modern business organizations. Your 'customer' is any person at work who uses your services. We can divide them into two groups: external customers and internal customers.

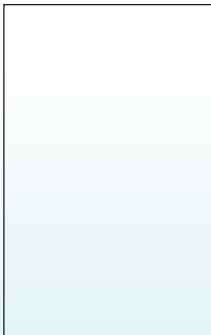
External customers are those who do not belong to your workplace. They are outsiders who use your services: shoppers, tradespeople called into your workplace needing information or assistance from you or, people making enquiries.

Internal customers are fellow employees who need your services. They might be your supervisor, manager, workmate or any other employee.

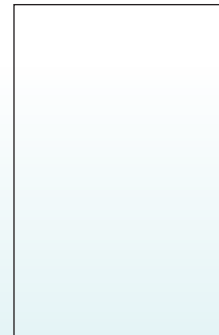
Learning and Practical Activity B1.1: My customers

List all your external and internal customers in the labeled areas. You can either write their names and/or the jobs they do.

My internal customers



My external customers



Learning and Practical activity B1.2: Making customers welcome

Let's get your ideas. If you could, how would you improve the way your workplace communicates with its customers? If you have a lot of good ideas, do this on your own. Otherwise, ask some other people (e.g. your teacher) for their ideas as well.



Make notes under the headings given below.

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Improving store communications

Visual Improvements (store layout, signs, colour schemes, written messages):

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Improvements in staff body language:

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Improvements in staff verbal communication:

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Learning and Practical activity B1.3: Reflecting on your experience as a customer

‘Do as you would be done by’ is a good guiding principle. It is also a quick way to learn about Customer Service. If you like to be treated in certain ways when you are a customer yourself, it stands to reason that these are exactly the ways to treat your own customers at work.

Think of the service you have received in stores lately. Make a list of things the best store assistants do or say which contribute to very good service.

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Step 2: Interacting with customers

In this Step you will build on the communication skills covered in a general way in Section A. Review these skills if you feel you need to.

Communicating with your customers

Keep these points in mind while communicating with customers:

Clear and accurate

Open, not judging

Mind customers' feelings

Mention their names

Unlearn your own poor habits **N**on-verbal messages matter **I**nterest in people

Calm if they're angry

Ask questions, get feedback

Try liking people and (most important!)

Enjoy working with them.

Learning and Practical activity B2.1: Speaking to customers

Below are some statements made by a retail company's staff to customers. In the column beside each statement, give it a rating.

The rating scale is:

| Rating | Description |
|--------|---|
| A | Top quality communication, the sort that brings the customer back again. |
| B | Average. No one could object, but no one would call it good service either. |
| C | Awful. This could lose a customer. |

| Statement to Customer | Rating |
|--|--------------------------|
| 1. 'No I won't refund money on those football shorts. They've got grass stains on the back and beer stains on the front. Some people!' | <input type="checkbox"/> |
| 2. 'I don't know where it would be'. | <input type="checkbox"/> |
| 3. 'Sorry, we don't have moose hats in this department. But the millinery department might be able to help you. They're on the second floor. The nearest stairs are just over there on the right'. | <input type="checkbox"/> |
| 4. 'I only speak English'. | <input type="checkbox"/> |
| 5. 'I wouldn't buy that. It makes you look like a whale'. | <input type="checkbox"/> |
| 6. 'Don't be so pushy. He was here before you'. | <input type="checkbox"/> |



| | |
|---|--------------------------|
| 7. 'Yeah, I agree with you about this place. At least you don't have to work here'. | <input type="checkbox"/> |
| 8. 'I am sorry you aren't happy with the service. I understand your point and I'll see my manager about it straight away. If you leave me your name and phone number, I'll get back to you this afternoon and let you know what action the store is going to take'. | <input type="checkbox"/> |
| 9. 'I don't know how the product works. Sorry'. | <input type="checkbox"/> |
| 10. 'Well hello there. Where have you been all my life?' | <input type="checkbox"/> |

Suggested answers are in the back of this Guide in the section Learning Activities: suggested answers.

Rewrite and improve these 3 statements

1. 'No I won't refund money on those football shorts. They've got grass stains on the back and beer stains on the front—some people!'

Improvement:

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2. 'Don't be so pushy. He was here before you'.

Improvement:

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3. 'Yeah, I agree with you about this place. At least you don't have to work here'.

Improvement:

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Suggested improvements are in the back of this Guide in the section Learning Activities: suggested answers.

Learning and Practical activity B2.2: Translator services

In a multicultural country like Australia, it is likely that you will have to serve customers who do not speak English and you may need to know how to access the services of translators.

Ask your teacher the answers to the following questions:

What is the company policy and/or procedures on serving customers who cannot speak English?

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Are there staff who can translate? (Record their names, languages and contact information)

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Section C: Good telephone communication

The three steps to good telephone communication are:

- Step 1:** Telephone technique
- Step 2:** After the call is over
- Step 3:** Using the phone system

Step 1: Telephone technique

Learning and Practical activity C1.1: Communicating effectively on the telephone

The way you use the telephone communicates an image of your company.

What image are these employees communicating?

In the space provided under each of the pictures below and on the next page, write down what message you think is being conveyed to the customer about the retail outlet they have just called.

Then tick the box under any picture that you think is demonstrating a good telephone technique.



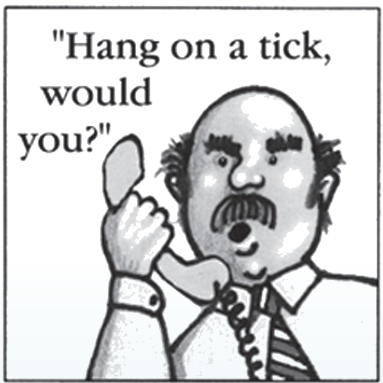
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Tick which of the following tips you could use at work.

| Telephone Tips | Tick |
|--|--------------------------|
| 1. Decide on a suitable greeting or use the company greeting. | <input type="checkbox"/> |
| 2. Let the phone ring a few times before you answer it. | <input type="checkbox"/> |
| 3. Always write down the name of the caller, their company and the | <input type="checkbox"/> |
| 3. reason they are calling. | <input type="checkbox"/> |
| 4. Once you know the caller's name, use it during the conversation. | <input type="checkbox"/> |
| 5. Use good listening techniques. | <input type="checkbox"/> |
| 6. Ask questions during a phone conversation. | <input type="checkbox"/> |
| 7. If you want to sound friendly actually smile, even though no one | <input type="checkbox"/> |
| 7. is watching. Use gestures too. | <input type="checkbox"/> |
| 8. Never leave people dangling on the other end. | <input type="checkbox"/> |
| 9. If the other person is talking, encourage him/her with short words | <input type="checkbox"/> |
| 9. and phrases: 'Yes. I see. Yeah. Right. Oh. Uh huh' and so on. | <input type="checkbox"/> |
| 10. Leave the conversation with a resolution. State clearly your understanding of what the follow up action will be. | <input type="checkbox"/> |
| 11. Make a friendly farewell. | <input type="checkbox"/> |

Your store's policy

It is likely that your store has its own policies and procedures to follow when using the phone for work purposes. If you haven't seen a set of procedures about using the telephone, ask your teacher for them.

Read the procedures and ask your teacher about any part you do not understand.

Most procedures are there to make sure that:

- Staff answer the phone in the same way.

- Staff conduct calls within guidelines.
- There is a clear system of passing on messages.
- There is a clear system of following up whatever action the call makes necessary.

Make notes about your phone procedures under the headings below:

What are the required ways of answering and finishing a phone call?

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What are the guidelines about conducting the call?

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What are the rules about making and receiving phone calls at work?

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Learning from the mistakes of others

Think of all the things which have annoyed you when you've telephoned people. Think particularly about retail businesses.

Make a list of these annoyances.

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Were any of these common annoyances in your list?

- Being interrupted by another call
- Being left waiting
- Poor tone: rude, unfriendly
- Person loses your call because s/he can't use the equipment
- Promised action never happens

Answering a work call

Fill in the blanks.

Note: You know that there is a 3 month warranty on the customer's hairdryer.

Ring! Ring!

Your response:

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Caller: This is Mohan. I need to speak to you about a hairdryer I bought four months ago. It's not working properly.

You response:

.....

.....

Maryann

Mohan: The horrible thing just blew up. That was the end of it. Kaput!

Your response:

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.....

Maryann

Mohan: I understand, I suppose. So what do we do now?

Your response:

.....

.....

Maryann

Mohan: Okay then. Bye.

Ask your teacher to check over this learning activity to make sure that this is how you should answer the phone at your workplace.

Learning and Practical activity C1.2: Practical session

1. Making a phone call

- Ring up your workplace teacher at a prearranged time.
- Have a call about a work matter.
- Write down what you said.
- Make sure that you followed the checklist in the Answer Section in the back.

2. Receiving a phone call

- Wait till you have to receive a call at work
- Check that you followed the procedures in the Answer Section in the back of this guide.

Step 2: After the call is over

It was found during a telephone monitoring project by one Australian retail company that more than 20% of calls were from people following up on their original calls.

Learning and Practical activity C2.1: Follow up

What should you do after you hang up the phone?

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What would you do after the following calls?

Scenario 1

Caller: 'Okay that's my complaint. I don't want to be rung back. I just wanted you to hear it. Goodbye.'

You: 'I am sorry you weren't happy with our service. Thanks for taking the trouble to let us know. Goodbye.'

Your follow up action:

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Scenario 2

Caller: 'You get this big order of mine up by this afternoon at the latest.

Ring me when you've got it.'

You: 'I wish I could. Unfortunately the process takes two days. That means you will have it by Friday afternoon.'

Caller: 'Today.' (Hangs up)

Your follow up action:

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Scenario 3

You: 'When would you be able to send a glazier to quote on the broken store window?'

Other person: 'We'll have someone there by lunchtime. Who should they ask for?'

You: 'Depends when lunchtime is. If it's before 12.30 ask at Reception for me. My name is _____. If it's after 12.30 ask for Tom Perkins. Okay?'

Other person: 'Fine, Bye.'

You: Goodbye.

Your follow up action:

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.....

Check your answers with your teacher to find out if your company has certain procedures it wants you to follow.

Learning activity C2.2: Follow up telephone checklist

Imagine you have to tell a new employee about how to follow up on phone calls at your workplace. Write a short checklist of the main points.

Telephone follow up checklist

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Step 3: Using the telephone system

Learning activity C3.1: Your telephone system

1. Find out about your telephone system at work

- Ask your teacher
- Collect any written procedures
- Collect relevant telephone company instruction booklets
- Read all materials thoroughly
- Observe how others use the phone system
- Ask other people at work
- Practice by using the telephone (ask permission first)

2. Make your own check list

Here is a list of all the procedures you should be able to do on your work phone.

Add any others which are specific to your workplace.

Can you:

- dial an internal number?
- dial an external number?
- contact the switch?
- divert an external call to another extension?
- divert an internal call to another extension?
- contact voicemail or message bank?
- interrupt a call to take another one?
- retrieve the first caller?



Now add your own:

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Section D: Working in teams

The three steps to working in teams are:

Step 1: What makes a good team?

Step 2: Team communication

Step 3: Avoiding and handling conflict

Step 1: What makes a good team?

Find Information

There may be additional resources that will help you complete the following learning activities. Ask your teacher about accessing some information on Working in Groups.

The old ways

It used to be thought that the only way to run a decent workforce was to have workers directed and organized individually by supervisors and management. This meant that people worked at their own jobs. No one did the work of someone else.

Learning and Practical activity D1.1: Successful teams

To work out how to create a good work team, let us take as an example the best team you know. Try your favourite sports team: football, basketball, swimming relay. It can be from any country but you should know something about it.

If you are not a sports fan, you have two options:

1. You can ask someone you know who does follow a good team.
2. You can think about a team in another area than sport such as a political, debating or work team. Or even a gang of friends, particularly a tight family group, a cast of a show or a team of dancers.

The only rule is that they must be a successful team. Write the name of the team and what they do.

A team of winners

Think about the team you have chosen. Imagine them playing a winning game (or giving a winning performance in whatever it is they do). You might even recall the most memorable game you saw your team play. The team moves as one unit, not a collection of separate people. Yet they are individuals—someone gets the best and fairest player award or is the star. How can people be both united and individual at the same time?

The answer is that winning teams get the perfect balance. Each person judges when to operate alone, (for example, when to shoot for a goal) when to think as a team member, (when to pass the ball to someone else to score).

Now make a list of what makes a winning team:

You might like to check this list with a friend, workmate or family member who is also a fan of the team you have chosen. Check it also with the list on the next page. Add any other items you think apply to your team. Think about how you can operate like a winning team at work.

Some characteristics of a successful team

- The right people to do the job are in the team.
- People have specialist skills.
- People understand what other team members do and have tried out their jobs.
- There is a leader. This person is a teacher, guide, mentor, can inspire people, can make decisions, is fair, consults, leads by example.
- Team members have techniques for holding meetings so they arrive at democratic decisions within time limits.
- All members agree on the team goals, on how to achieve them and by when.
- The team's results are measured and acknowledged.
- Individual effort is acknowledged.
- People are praised for being team players.
- Time is not wasted.
- Team members are flexible and adaptable.
- There is personal goodwill among members.
- The team is properly trained to do its job and individual specialists are properly trained too.

- Members feel excited about belonging and achieving.
- Team members have good communication skills with each other.
- Problems are not allowed to fester unresolved.

Learning and Practical activity D1.2: The work team

1. Do you work in a team? If so, who is in it?

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2. If you haven't got a formal team, who would you say is in your immediate work group?

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Step 2: Team communication

Most of the communication skills taught so far in this unit have been directed to you as an individual. In this step we are going to examine ways you can improve your communication as a member of a work team.

Teams need to succeed in three sorts of communications:

- The team members need to communicate well with *each other*. They rely on each other's work. In this sense they are each other's *internal customers*.
- The team needs to communicate well with other teams at work. These are *internal customers* too.
- The team has to communicate directly with their *external customers*.

Learning and Practical activity D2.1: Starting with yourself

Think about the group of people (the 'team') you work most closely with. How well do all of you communicate as a group?

Tick the answer which best applies

| | |
|--|--------------------------|
| We communicate extremely well. We are able to speak honestly and people listen to each other. | <input type="checkbox"/> |
| It's a bit mixed. Sometimes we communicate well and at other times we are hardly able to get through to each other at all. | <input type="checkbox"/> |
| We communicate very poorly. No one speaks honestly and no one would listen even if they did. | <input type="checkbox"/> |

Communicating within a team

How can people who work closely together who rely on each other every day for so many hours, actually get on all the time? The answer is, of course, that they don't. Because conflict is almost unavoidable, the team must have good communication skills and conflict resolution skills. The first of these are dealt with in this step, the second is the subject of the next step.

You as a team member

The trouble working closely with people is that certain characters start to grate on you. Have you ever experienced this?

Your irritability checklist

Is this how you react?

1. Anything they say irritates you.
2. The minute they start to speak you are looking for faults.
3. You switch off when they speak.
4. You think about their personal habits or appearance ('Gee, I hate his socks'... 'Her voice drives me crazy') instead of listening properly.
5. You talk critically about them to others in the group behind their backs.
6. You avoid eye contact (or any contact at all).
7. Your body language screams 'I am not going to listen to you'.
8. You are rude.

Pick a person at work who you feel negative towards or with whom you have some trouble working. You may have a strong dislike or a mild irritation.



Your task is to overcome this until you feel you now accept this person and can have a reasonable working relationship.

You do not have to

- try very hard
- become friends
- tell anyone.

You do have to

- work at it
- not give up
- use the techniques given previously
- be able to successfully work with the person in the end.

Tick the checkbox when you have selected the person.

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Tick the checkbox when you have succeeded in establishing a working relationship.

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How did you do it?

Make a list of your techniques:

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Learning and Practical activity D2.2: Communication skills which enhance teams

The communication skills that help teams to work are:

1. **Assertiveness**
2. **Listening responsively**
3. **Speaking confidently**
4. **Contributing to decisions**

1. Assertiveness

There are many other ways of communicating in a team. Team members can be:

- Passive
- Dominating
- Restrained
- Assertive
- Aggressive

Now let's look at each of these types of behaviour.

Try to think of someone you know who fits into each one of these categories.

Aggressive behavior is characterized by anger, blame and insensitivity to others. What effect would that have in a team?

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Dominating behaviour is bossy and people may only back up.

What effect would that have in a team?

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Passive behaviour lets others trample all over you.

What effect would that have in a team?

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Restrained behaviour may be inoffensive but a restrained person is pulling back from taking full part in a team. What effect would that have in a team?

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Assertive behaviour is the one in the middle, the one to aim for in communicating with people in your team. What effect would that have in a team?

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Think about it.

Aim to be an assertive person.

An assertive person:

- ☒ Says what s/he wants to say clearly and honestly
- ☒ Expects that s/he has as much right as anyone else in the team to be heard
- ☒ Can say 'no'
- ☒ Respects and listens to others
- ☒ Is able to admit to be wrong without feeling s/he has lost face
- ☒ Is able to admit errors
- ☒ Knows s/he deserves respect
- ☒ Gives the same rights to others as s/he claims for her/himself

Where are you?

How do you think that people would describe you: passive, aggressive or assertive?

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Is that where you want to be?

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Review the qualities of an assertive person on the previous page.

List the qualities you think you already have:

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List the qualities you would like to have:

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Rewrite the two sentences below as they would be said by an assertive person:

1. Passive: ‘I might be wrong but I was going to say that we should take more care with our packaging. Well sort of...’

An assertive person would say:

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.....

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2. Aggressive: ‘You are so dumb. I’ve been here longer and I know that our queues are too long on Thursday nights’.

An assertive person would say:

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Check your answers with the suggested answers at the back of this Guide.

Listening responsively

To respond well to others in a team use the listening skills you have learned about in Sections A and B. When communicating in a team, listening is particularly important.

Listening is part of assertive behaviour:

- Aggressive: always talks
- Assertive: listens and talks appropriately
- Passive: always listens

When listening in a work team:

- give the speaker your best attention
- show with your body language that you are giving your best attention: maintain eye contact, lean towards rather than away from the speaker, nod to give encouragement
- check with questions that you have understood
- help create a friendly supportive 'team' atmosphere in which everyone can speak with confidence.

Speaking confidently

Everyone in a team has to be able to contribute with honesty and integrity. In fact, the success of a team depends on it. This means that at times team members will disagree.

- Be assertive. You have an equal right to talk.
- What you have to say may be crucial.
- What you have to say may be wrong.
- Consider both the above before you speak. Don't shoot off at the mouth.
- 'Play the ball and not the man'. Disagree with an idea not the person who thought of it.
- Acknowledge other people's ideas and contributions. If you didn't first think of a good idea, it doesn't matter.
- Build on each other's good ideas. Having an idea take off with lots of people contributing excitedly to its growth, can be a real roller coaster of a ride. This is team creativity at its best.
- Speak with enthusiasm not emotion.

Contributing to team decisions

How do you arrive at a decision in a team meeting at your work? Tick whichever applies at your workplace:

| | |
|---|--------------------------|
| We all stay quiet so we can get out of there. Whoever cares enough gets their way | <input type="checkbox"/> |
| The team leader decides and we all nod | <input type="checkbox"/> |
| We vote | <input type="checkbox"/> |
| We have another method of arriving at decisions | <input type="checkbox"/> |
| We never arrive at decisions | <input type="checkbox"/> |
| We brainstorm | <input type="checkbox"/> |
| Other (describe them) | <input type="checkbox"/> |

Whatever method you use to arrive at decisions, make sure:

- there is democratic discussion beforehand: everyone gets heard, no one dominates
- each team member is part of the decision
- the team doesn't decide until it has enough information
- there is an action plan to take the decision from words into doing something
- everyone agrees to abide by the decision after it is made
- you care about getting it right and don't give way to cynicism.

Try to contribute to decisions made this way.

Learning and Practical activity D2.3: The team meeting

Read what is said at this team meeting.

Team Leader: As you all know we have an urgent situation here at the moment.

Our section of the store, the delicatessen, is losing money. The manager told me today that we have to produce a miracle or they will close our section down.

Tarun: How dare they? What about all our special skills and training? I've been here eight years. Where will I get another job?

Jatin: Shhh Tarun! Don't annoy anyone. It doesn't do any good.



Manju: I think we should first write up everything that's wrong about how we work in the deli. Then we could come back to each problem and put them in order from the biggest to the smallest. Then maybe we could discuss how to solve the biggest ones.

Team Leader: I support this method. I suggest we go with it. Let's start.

Tarun : Hang on! Just a tick! I don't agree to that. I'm going to hand out free cheese to all my customers today. That'll fix the manager.

Manju: It would fix us too. Let's get back to our plan.

Jatin: Let's not talk about it till later. It's too distressing. We all get so upset.

Team Leader: Would anyone like to start naming our problems? I'll write them up when you call them out.

Manju: Our number one problem seems to be theft. Our figures show that we have more of it than any other department.

Tarun: Our number one problem is that Mary knows what all our problems are.

Jatin: I wish we could leave this fighting and go back to work.

Tarun: What are you Jack, a wimp or what?

Manju: Could we find out the figures for theft in our department compared to the other departments?

Team Leader: Here they are and they support what you say, Mary.

Tarun: Figures and talk! That's all we ever get round here. I'm leaving to cut up the meat for the big give-away. What about you wimp features? Going to give me a hand?

Jatin: This is so awful. I feel quite sick. Let's all try and get on together.

Team Leader: You give anything away Tom and you're dead meat!

Tarun: I'll do what I want!

Team Leader: I'll have you charged with theft.

Jatin: (wringing his hands) Oh no! Our theft figures will get even worse!

Manju: I have a suggestion for stopping theft. Let's move the shelves and get a surveillance camera.

Team leader: Too late.

Questions

Who is being aggressive?

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Who is being passive?

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Who is being assertive?

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What do you think of the way the team leader communicated in the meeting?

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How would each person have to change to resolve the crisis? (If you think no change is needed, write no change).

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Tarun?

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Manju?

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Jatin?

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Team leader?

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Suggested answers can be found at the end.

Step 3: Avoiding and handling conflict

We are so used to the devastation of wars that we tend to think that conflict is to be avoided at all costs. And generally this is right. A team working in peace and cooperation is better than a quarrelling, divided group. However, sometimes conflict can be positive. It can mean people disagree because they care about getting something right. It can mean that creative ideas are being expressed and that people are lively. 'Peace at any price' can mean that a team is stale.

It is important to work out when conflict is positive and how to stop it becoming negative. Similarly it is important to know how to resolve destructive conflicts as quickly as possible or to avoid them altogether.

Negative conflict

We can judge that negative conflict is present by its effects. Signs of negative conflict are:

- The workplace is divided into in-groups and out-groups. People gossip and criticise, mostly behind backs.
- There are stand up brawls.
- Some people are long term enemies.
- There are more resignations, requests for transfers and sick leave than you would expect.
- The productivity of the group is disappointing.

- People spend a lot of energy working out how to trip up the boss or each other. This is done slyly, not openly. They laugh at each other's misfortunes.
- People tell each other it is an unpleasant place to work without being able to say exactly why.
- People respond to criticism or suggestions for improvement by being defensive.

Positive conflict

Signs of positive conflict are:

- Team members believe they are getting somewhere in solving problems and making improvements.
- There is lively discussion.
- If conflict becomes angry and hurtful, feelings are quickly mended.
- People forgive each other easily.
- People keep talking and debating after the meeting is over.
- People think about the issues in their own time.
- Everyone tries to keep a balance between being 'over nice' and 'over pushy': assertive behaviour is mainly in evidence.

Learning and Practical activity D3.1: Handling conflict

Here are 6 techniques for handling conflict when it arises.

Read each one and answer the questions. Discuss your answers with your teacher.

Technique 1: Analyze the stage that the conflict is in

There are recognizable stages of conflict:

Early stages: There are disagreements and 'digs' but people get over them. Things may feel funny.

Middle stages: The effects of the tensions last even after the little digs and disagreements are over.

Late stages: People are noticeably upset and tense. There are flare ups. People talk openly about the conflict. They try to get away.

Think about a conflict situation you have had (or are having) at work or in your home life.

What stage is it in?

.....



How did it get to this stage?

.....

Technique 2: Name the conflict

How could you name the conflict openly to the people who are part of it?

There can be a relief in having the conflict named and described. Make sure everyone has a go at naming it.

.....

.....

Technique 3: Use a group discussion technique (such as brainstorming) to come up with creative solutions.

Write some of the possible solutions here:

.....

.....

Technique 4: Make 'I' statements

'You' statements can sound blaming in a conflict situation. 'I' statements take the responsibility for the point of disagreement away from the listener. The speaker accepts the responsibility. Follow up an 'I' statement with a clear unemotional statement about what you want. Turn the following 'You' statements into 'I' statements.

| You statements | I statements |
|------------------------------|---|
| e.g. You never listen | I feel that you have not listened to what I just said and in future I would like you to pay more attention so that we can come up with a solution to this |
| You stop me working properly | |
| You make me feel upset | |
| You never listen | |
| You're dominating | |

Technique 5: Be assertive

You know how to do this. Check back to Learning Activity D.2.2 if you need to.

Technique 6: Aim for a 'Win-Win' solution

Decide that you will settle for no less than a solution in which everyone is a winner.

To achieve this outcome:

- You must want it: it's no good still wanting your own way. You must really desire a fair result for everyone.
- You have to think bigger than your own opinions and desires. You have to mentally hover above the situation—detach and see the big picture.
- You must cooperate.
- You must be guided by the principle of fairness.

Section E: Read and interpret retail documents

The four steps to reading and interpreting retail documents are:

Step 1: List and accurately describe a range of retail documents

Step 2: Read and interpret a range of retail documents

Step 3: Complete retail documents in line with store policy

Step 4: Act on information and instructions contained in retail store documentation

Step 1: List and accurately describe a range of retail documents

Check your store's policies and procedures

The type and extent of retail documents which will be available will depend largely on the type and size of the store or business you are working in. As a larger store may undertake a wider range of transactions, a greater range of retail documents may exist. These may also be supported by detailed policy and procedures manuals, which may provide you with a good source of information.

In a smaller store, the range of retail documents may be more limited, or processes may be carried out without the need to complete any formal documentation. There may also be less call for detailed policies.

To ensure that you can comply with correct procedures, you must have a sound knowledge of the various retail documents in use in your store or business. In fact, your knowledge of these



procedures and documents is just as important as your knowledge of the products you sell or the services you provide. These documents relate to routine tasks that need to be done, how staff are to present themselves, how staff are to relate to customers and legal and financial transactions.

Learning and Practical activity E1.1: Listing retail documents and describing the authorization required

Find out what different types of retail documents you have in your store. If your store or business has a large number of forms, it is likely that they will be listed in a procedure manual or similar.

List the main documents that you would be likely to use in your everyday work activities. Identify who would normally authorize the use of the documents. For example, a Petty Cash Form may be authorized by the Store Manager.

- In the **left** hand column of the table on the next page, make a list of the types of retail documents available.
- In the **right** hand column, write the title of the position which would be authorized to approve the activity documented on the form. If you aren't sure, find out who has the necessary authorization when you return to work, and complete the table then.

| Type of Retail Document | Who (position title) authorizes this? |
|-------------------------|---------------------------------------|
| | |
| | |
| | |
| | |
| | |

Step 2: Read and interpret a range of retail documents

As we have already discussed, the number of documents in use and their degree of complexity will be determined by the size of the store or business, and the work carried out. While it is essential to have a detailed knowledge of these documents, it is just as important to be able to read and interpret any supporting documents, including policy and procedures manuals.

The following steps may help you effectively interpret retail documents:

1. Take the time to carefully read the document through. If you are still unsure about anything, read it a second time, underlining or highlighting key words and using a dictionary.

2. Once you are confident that you understand the document, consider its purpose. For example, what is the aim or objective of the policy or form?
3. And lastly, consider the context or environment in which you are working. Seek your teacher's advice about how the policy is applied at your work place.
4. Once you have completed the above steps, you should be able to effectively interpret the document, clearly understand its intent, and take any steps to apply the policy. The following activity has been developed to help you to do this.

Learning and Practical activity E2.1: Reading and interpreting retail documents

Your Store Manager has recently issued a new policy relating to the acceptance of cheques within your store.

Your current supervisor, Geeta, has circulated the changes to the policy on accepting cheques. She has also attached some questions about the policy changes that she has asked all her staff to answer so that the changes can be introduced smoothly. She would like you to put your answers in the space provided.

Acceptance of cheques

To All Staff

As many of you would be aware, we have recently seen an increase in the number of dishonoured cheques received by this store. As these cheques are received in good faith, we do not know that the customer has insufficient funds in their account to cover the cheque until our bank attempts to present the cheque some days later. As Manager of this store, I seek your assistance to minimize the incidence of dishonoured cheques. Dishonoured cheques result in embarrassment for the customer and increased work for all staff. We also incur additional costs as the bank charges us an administrative fee for trying to present a dishonoured cheque. And finally, as we cannot always contact the customer to obtain payment for the goods received, we must sometimes bear this loss.

In order to help overcome these problems, the following changes will come into effect from the first day of next month:

1. the customer's address, phone number, and license number (where available) must be written on the back of any personal cheque;
2. at the time of purchase, the customer must present at least two forms of identification, for example, a Medicare Card and Bank Account card. However, if the customer has a photographic license, this will be sufficient; and
3. all cheque payments for amounts in excess of Rs 200 must be authorized by the Section Manager.

As many valued customers use cheques to pay for their purchases, it is not practical to simply stop accepting cheques in payment for our goods. However, it is hoped that the new measures outlined in this policy will help us minimize losses and ensure that we continue to provide the high level of service that our customers have come to expect.

If you have any suggestions regarding the new policy, please do not hesitate to contact your Section Manager.

Ramesh
Store Manager

Memo

From: Geeta

Section supervisor,

New store policy - questions

1. Why do we need a new policy for cheque payments?
2. What are the benefits of introducing the policy?
3. Cheques in excess of what amount need to be authorized by the Section Manager?
4. Does the customer always have to produce two forms of identification?
5. Is the new policy likely to have any negative effects?

Step 3: Complete retail documents in line with store policy

As with policies and procedures, stores and businesses have a range of retail documents which help them to be more effective. For example, a larger store which offers its own credit card is likely to have a Credit Application Form which would:

- allow the applicant to list all relevant personal details, including income, expenditure, assets and referees;
- provide the store with written evidence of the particulars supplied in the application; and
- include a checklist to assist store staff to carry out all necessary checks and procedures, and record approval details.

As such documents may relate to important tasks or functions, it is essential that they are completed carefully and accurately. Using the above example, if a staff member **incorrectly** recorded the card number for an applicant and this number was then entered into the computer system, the customer may be incorrectly charged or not receive their monthly account statement.

When completing any retail document, you should:

- ensure you are fully familiar with the document and understand its purpose;
- read any relevant policies to confirm your understanding, particularly if using a document for the first time;
- speak with an experienced staff member if you are unsure about anything;
- complete the document neatly and legibly; and
- if required, always sign and date the document for record and audit purposes.

Learning and Practical activity E3.1: Completing documents in line with store policy

Consult with your teacher and **select a range of documents** which your store requires staff to fill in or complete, such as leave forms, petty cash forms, telephone message slips, staff record forms, stock inventory sheets, product return slips, etc.

Seek advice if you are unsure how to fill them in, practice and then **fill in each of the documents correctly and accurately**, according to store policy. Get your teacher or the person who approves or authorizes the document to check your work. **Organize the completed documents** with those in Learning Activity E1.1.

Step 4: Act on information and instructions contained in retail store documentation

To effectively act on information or instructions contained in a retail store document, you need to:

- 1. Carefully read the document;**
- 2. Consider its purpose; and**
- 3. Consider its context or environment**

Often, it is the last of these three tasks which can be the most difficult. In clear-cut cases where a simple 'yes' or 'no' response is required, it can be easy to make the correct decision. However, where a document is complex or an issue is particularly sensitive, making the right decision can be more difficult. And even if you do make a decision which you believe is right, there may be other consequences. For example, if a staff member asks you to approve overtime and you refuse, the staff member may be angry or upset, and this might lead to a temporary decrease in staff morale.

When acting on information or instructions contained in retail documents, you can only make recommendations and decisions based on your best assessment of the situation. If you have taken the above steps and are still unsure what to do, you might find it useful to:

- speak with another member of staff or a supervisor to obtain their opinion; or
- look at any relevant guidelines or procedures

Once you have completed the above steps and considered all available information, you should be able to make a reasoned decision which you can justify if necessary.

From time to time, it is probable that a decision you make will prove incorrect. This may be because further information comes to hand or a situation changes. Or it may be simply because you have made an error in judgment.

Whatever the cause, you must remember that people make many decisions each day. It is therefore probable that, from time to time, you will make an error. If you realize that you have made a mistake, take corrective action and notify your supervisor if necessary. And don't forget—everyone can learn a great deal from their mistakes.

Learning and Practical activity E4.1: Act as required on information and instructions contained in retail store documents

Consult with your teacher and select a range of processes and procedures which directly relate to your work situation and require you to take action.

These may be written instructions or they may not be written down. In a smaller workplace, such instructions may be part of your employer's special knowledge or way of doing things. The procedures may relate to store safety, relating to customers, answering the telephone and taking accurate messages, opening and/or closing the store and operating retail equipment.

Read, interpret and act on the instructions.

Seek advice if you have questions. Get your teacher to check that you are acting correctly. If the information is not in written form, organize yourself to take notes, listen carefully and make a written list of instructions. Remember, if you make mistakes, get feedback, take corrective action and get it right next time!

- 1. List the procedures that you must follow to carry out your work.**
- 2. Tick the procedures that have written instructions.**

If there are no written instructions write notes about what must be done.

Procedures I must follow are:

.....

.....

.....

Learning activities: Suggested Answers

SECTION A: THE SKILLS OF COMMUNICATION

Learning and Practical activity A1.1: Channels of communication

What types of communication are used when a store advertises its annual sale on television?

The whole four are used: verbal (spoken and written) and non-verbal (visual and body language):

1. Spoken communication (the announcer tells you about the sale).
2. Written communication (the advertisement shows the store's name at least, and probably has more signs, like 'Men's shirts now only Rs. 200').
3. Visual communication (you see visuals, like people rushing into the store or pictures of the sale items).
4. Body language (for example, the announcer's smiles, enthusiastically waving arms, pointing gestures).

Learning and Practical activity A2.1: Identifying good verbal communication skills

1. Plan when and where to say it

Sheree should ask the advice of someone she trusts who knows the boss well or who has worked there for a longer time than she has. She doesn't have to say the reason she wants to talk to the boss. She should spend some time trying to understand the manager. Is s/he a formal person who likes appointments or a casual person who likes to talk to employees on the job? If it is a large workplace an appointment might be more appropriate; in a small workplace it might look ridiculous.

If she makes an appointment she has communicated that it is a serious issue to her. If she talks casually she communicates that the issue is less important.

2. Collect information which supports her claim

Here is some information she might collect beforehand.

3. Plan how to start speaking

Write out the first four or five sentences in which she introduces the issue to her manager. Write a few words to describe the tone of voice she should use.

Tone: Open, friendly, respectful but not 'crawly'.

Could begin: *'Thanks for speaking to me, Mr/Mrs/Ms It's about my pay. I*

think I have been underpaid since 20th August 2010 by Rs. 1000 a pay. I think my pay rate is and I have been paid at I have a copy of the paper work here. Would you like to see it now?'



3. Plan what to do in the case of these possible outcomes

Write down the main points she should cover if the manager just listened:

Continue as in the previous answer. Show paper work, explaining each document.

Finish with something like, '*Thanks for the opportunity to set it straight. Is there anything else I should do to fix it up?*' She has been direct, polite, clear and has presented the evidence. The ball is now in the manager's court.

The manager hears her introduction and starts to argue with her immediately, saying things like 'I'm sick of employees moaning about their pay and doing as little as possible to earn it' and 'I don't want to know about this. Get back to work.'

She should read the situation: is there anything she has misjudged in her approach? Was the boss in the middle of a very busy activity? Maybe another attempt would succeed. If it doesn't the next communications move should be in writing. She should maintain the clear, polite tone here as well. She should be factual and attach the evidence.

The boss listens for a short while then interrupts and tries to sidestep the issue, saying things like 'Look, I'm just too busy now. Catch me another time.'

She could say something like, 'Fine. When would suit you, Mr/M/Mrs -----?' Then write it down (preferably in a diary) so she doesn't forget. If the boss's evasive actions continue, she will have to put it in writing.

SECTION B: COMMUNICATING IN A RETAIL ENVIRONMENT

Learning and Practical activity B2.1: Speaking to customers

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

Rewriting poor communication

1. 'I'm sorry we cannot refund the money on the football shorts. The reason is that there are marks on them.'
2. 'I understand your frustration at standing in the queue. I'm sorry that you have to wait. We'll be with you soon.'
3. 'I'm sorry you aren't happy with the store. We'll try to meet your expectations.'

SECTION C: GOOD TELEPHONE COMMUNICATION

Learning Activity C1.2: Practical session

Making a phone call checklist

Did you?

- ☒ Use your company procedures
- ☒ Say who you are clearly and politely
- ☒ Say what you want clearly and politely
- ☒ Follow store policy if there is one
- ☒ Listen carefully and use verbal responses
- ☒ Use a pleasant friendly varied tone
- ☒ Use the other person's name during the conversation
- ☒ Keep the call on the topic
- ☒ Use questions to check that both parties have understood
- ☒ Make sure there is a notepad and pen beside the phone
- ☒ Finish the phone call with an agreement if appropriate and a friendly manner

Receiving a phone call checklist

Did you?

- ☒ Use company procedures
- ☒ Wait for the phone to ring a few times before answering it
- ☒ Have a notepad and pen (or store message pad) to take down details
- ☒ Answer the phone with a friendly prepared sentence
- ☒ Follow store policy if there is one
- ☒ Use the caller's name during the conversation



- ☑ While listening, encourage with verbal responses
- ☑ Check with questions that both parties understood each other
- ☑ Use a pleasant friendly varied tone of voice
- ☑ Sound helpful
- ☑ Keep on the track of the topic of the call
- ☑ Finish off the call in a friendly manner, summarizing if necessary.

SECTION D: WORKING IN TEAMS

Learning Activity D2.2: Communication skills which enhance teams

- Aggressive
- Dominating
- Assertive
- Restrained
- Passive

Rewriting sentences as they would be said by an **assertive** person:

1. *'I might be wrong but I was going to say that we should take more care with our packaging. Well sort of.....'* (passive)

An assertive person would say:

'We need to take more care with our packaging so that we can reduce damage'.

2. *'You are so dumb. I've been here longer and I know that our queues are too long on Thursday nights'* (aggressive)

An assertive person would say:

'Our queues are too long on Thursday nights.'

Learning and Practical Activity D2.3: The team meeting

- Rahul is aggressive
- Seetha is passive
- Sunita is assertive
- The team leader starts off well: s/he outlines the problem at the beginning and encourages assertive discussion. However, s/he handles Tom badly and gives up too soon.

To resolve the crisis as a team

- Rahul would have to respect and listen to others' views, moderate his ideas and be assertive, not aggressive. He would have to be a team player and really care about solving the problem.
- Seetha: no change
- Sunita would have to be less passive and fearful and more assertive. He would also have to care about solving the problem. He wants it just to go away.

The team leader: would have to learn to handle aggressive and passive people and not to be so easily defeated.

Learning and Practical Activity D3.1: Handling conflict

- 'You stop me working properly'
- 'You make me feel upset.'
- 'You never listen' (example in Learning Activity)
- 'You're dominating'

Turn the above statements into 'I' statements:

- 'When you [factual description of behavior, e.g. play loud music] I find it difficult to work properly and I would appreciate it if we could agree to some quiet times during the day for study'
- 'I feel upset when you [specific behavior] and what I would appreciate is [specific outcome or behavior]'
- 'I would like to state my opinion and when you speak very loudly it makes it difficult to be heard, it makes me feel frustrated and ineffective'

Suggested Resources

The following resources provide access to information which can support you in completing the learning activities in this guide. The resources can be accessed through the Web, public libraries or collections held in your workplace

Accessing websites requires caution as information contained on them can be biased according to the purpose of the website, or can quickly become outdated. The currency of the site may be checked by referring to information regarding the most recent update.

You should also maintain your own list of any additional resources.

Books

DeVrye, Catherine 2000, *Good Service is Good Business: 7 Simple*

Strategies for Success, 2nd ed., Pearson Education Australia, Frenchs Forest, N.S.W

Dickman, Greg. 2000, *Business Mathematics*, 2nd ed., Nelson, South Melbourne.

Dwyer, J. 2000, *The Business Communication Handbook*, 5th ed., Prentice Hall, New York: Sydney.

Wrice, M. 2001, *First Steps in a Retail Career*, 2nd ed., Macmillan, South Melbourne

Websites (viewed September 2008)

<<http://retailindustry.about.com/>>

U.S. site with reference information on a wide range of topics relating to the retail industry, including: career information, retail news and education.

<<http://www.serviceskills.com.au>>

Refer to the Service Skills website for details of suppliers and other resources.

