



# Build and maintain a team approach to service **delivery**

D2.TCS.CL5.03

Assessor Manual





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William  
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Specialist centre  
for foods, tourism  
& hospitality



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## Project Base

William Angliss Institute of TAFE  
555 La Trobe Street  
Melbourne 3000 Victoria

Telephone: (03) 9606 2111  
Facsimile: (03) 9670 1330

## Acknowledgements

Project Director: Wayne Crosbie  
Project Manager: Jim Irwin  
Chief Writer: Alan Hickman  
Subject Writer: Quentin Derrick  
Editor: Jim Irwin  
DTP/Production: Daniel Chee, Mai Vu, Cindy Curran

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# Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

## ***Suggested Assessment Methods***

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

## ***Alternative Assessment Methods***

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

- a) The nature of the unit
- b) The strengths of participants
- c) The number of participants in the class
- d) Time required to complete assessments
- e) Time dedicated to assessment
- f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

### ***Selection of Assessment Methods***

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

### ***Assessing Competency***

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

#### **Pass Competent (PC)**

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

#### **Not Yet Competent' (NYC)**

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).



This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

- a) Undertake further training or instruction
- b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

### ***Regional Qualifications Framework and Skills Recognition System***

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

### ***Recognition of Prior Learning (RPL)***

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

### ***Code of Practice for Assessors***

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

### ***Instructions and Checklist for Assessors***

#### **Instructions**

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

#### **Preparation**

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

#### **Briefing Checklist**

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

**Checklist for Assessors**

Prior to the assessment I have:	Tick (✓)	Remarks
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

## ***Instructions for Recording Competency***

### **Specifications for Recording Competency**

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

## ***Instructions for Different Assessment Methods***

### **Specifications for Work Project Assessment**

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):  
 "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.  
 These work projects are part of the formal assessment for the unit of competency titled X:
- You are required to complete these activities:
  - a) *Using the 'X' method of assessment*
  - b) *At 'X' location*
  - c) *You will have 'X time period' for this assessment*
- You are required to compile information in a format that you feel is appropriate to the assessment
- Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

### ***Specifications for Oral Question Assessment***

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):  
*"These oral questions are part of the formal assessment for the unit of competency titled X.*

*There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.*

*We have 60 minutes for this assessment.*

- I will give you feedback at the end of the assessment
- Do you have any questions about this assessment?”
- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    - a) Ticking PC or NYC, as appropriate
    - b) Entering ‘Remarks’ as required
    - c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

### **Specifications for Written Question Assessment**

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of ‘Written Questions’ for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a ‘X’ is identified, please input appropriate information):

“These written questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability.

You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- The due date for completion of this assessment is X
- On this date you must forward the completed questions to the assessor by X time on the date of X
- Do you have any questions about this assessment?”
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

### ***Specifications for Observation Checklist***

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

### ***Specifications for Third Party Statement***

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.



## Competency standard

<b>UNIT TITLE:</b> BUILD AND MAINTAIN A TEAM APPROACH TO SERVICE DELIVERY		<b>NOMINAL HOURS:</b> 80
<b>UNIT NUMBER:</b> D2.TCS.CL5.03		
<b>UNIT DESCRIPTOR:</b> This unit deals with skills and knowledge required to develop and lead a customer service team to provide identified standards of service delivery.		
<b>ELEMENTS AND PERFORMANCE CRITERIA</b>	<b>UNIT VARIABLE AND ASSESSMENT GUIDE</b>	
<p><b>Element 1: Develop service standards</b></p> <p><b>1.1</b> Identify the <i>internal and external factors impacting on the level of customer service to be provided</i></p> <p><b>1.2</b> <i>Research customer expectations and opinions</i> regarding current level, and expected level, of service delivery</p> <p><b>1.3</b> Integrate research findings into draft <i>service standards</i></p> <p><b>1.4</b> Liaise with management to ratify service standards</p> <p><b>1.5</b> Produce written service standards for team use</p> <p><b>Element 2: Establish service teams</b></p> <p><b>2.1</b> <i>Nominate the service teams that are required to support required levels of service delivery</i></p>	<p><b>Unit Variables</b></p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to organisations that are involved in customer service delivery within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> <li>1. Travel Agencies</li> <li>2. Tour Operation</li> </ol> <p><i>Internal and external factors impacting on the level of customer service</i> may be related to:</p> <ul style="list-style-type: none"> <li>• Location of service delivery</li> <li>• Customer expectations</li> <li>• Advertised levels of service</li> <li>• Customer profiles</li> <li>• Customer service levels being implemented by the competition</li> <li>• Image and past performance of host enterprise</li> </ul>	

<p><b>2.2</b> Identify membership of the nominated service delivery teams and <i>oversee the establishment of teams</i></p> <p><b>2.3</b> <i>Communicate established service standards</i> to team members</p> <p><b>2.4</b> <i>Train staff</i> in service delivery standards</p> <p><b>Element 3: Work to improve service</b></p> <p><b>3.1</b> <i>Monitor team performance</i> in terms of service delivery</p> <p><b>3.2</b> <i>Review policies, procedures and standards</i> relating to service delivery</p> <p><b>3.3</b> <i>Allocate resources to enable the provision of identified service delivery standards</i></p> <p><b>3.4</b> <i>Assist team members to resolve customer complaints</i> regarding the provision of service delivery</p> <p><b>3.5</b> <i>Support team members to rectify instances of deficient service delivery</i></p> <p><b>3.6</b> <i>Monitor the extent to which service delivery targets are achieved</i></p> <p><b>3.7</b> <i>Take action to address failure</i> to meet service delivery targets</p> <p><b>3.8</b> <i>Maintain records relating to service delivery</i></p> <p><b>Element 4: Liaise with management regarding service delivery</b></p> <p><b>4.1</b> Discuss suggestions for improvements to service delivery with management</p>	<ul style="list-style-type: none"> <li>• Budget, including ratio of team members to clients/customers</li> <li>• Safety issues, including consideration of the varying service levels that exist in an office environment and on a tour</li> <li>• Reputation</li> <li>• Workplace quality rating.</li> </ul> <p><i>Research customer expectations and opinions</i> should include:</p> <ul style="list-style-type: none"> <li>• Studying customer complaints and compliments that have been received by the organisation</li> <li>• Observation of current service delivery</li> <li>• Interviewing customers and staff regarding their experiences and issues with the receipt of service and service delivery</li> <li>• Determining the levels and standards of service being provided by the opposition</li> <li>• Accessing existing industry research data regarding service delivery.</li> </ul> <p><i>Service standards</i> may be related to:</p> <ul style="list-style-type: none"> <li>• Time taken to respond to customers, including waiting time for in-person interactions and transactions as well as electronic responses via e-mail and telephone</li> <li>• Ratio of service delivery team members to customers</li> <li>• Level(s) of service quality, including consideration of the varying quality standards that may legitimately apply within the one organisation under nominated and different circumstances</li> <li>• Identification of objective monitoring parameters to determine whether or not service standards are being achieved or not</li> <li>• Personal presentation, appearance and dress of service delivery team members, including personal hygiene, uniforms and attitude</li> <li>• Setting mandatory minimum training and other requirements for service delivery team members before they are allowed to provide service delivery</li> </ul>
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<p><b>4.2</b> Discuss significant instances of failure to deliver identified service delivery standards with management</p> <p><b>4.3</b> Provide operational information regarding service delivery to management</p> <p><b>4.4</b> Participate in developing service delivery teams and standards for emerging and new business activities and markets</p>	<ul style="list-style-type: none"> <li>• Identifying prescribed communication strategies for dealing with nominated and regular service delivery requirements, including greeting customers, dealing with difficult customers, fare welling customers verbally and non-verbally</li> <li>• Production of written material to be given to, or seen by, customers, including signage, web-based, forms, handouts and all enterprise-specific documentation.</li> </ul>
<p><b>Element 5: Lead service delivery team</b></p> <p><b>5.1</b> Interpret stated service delivery standards for team members</p> <p><b>5.2</b> Encourage team members to take advantage of opportunities to enhance service delivery</p> <p><b>5.3</b> Allocate service delivery tasks to team members</p> <p><b>5.4</b> Advise team members of changes to service delivery standards and/or targets</p> <p><b>5.5</b> Provide feedback to team members regarding the provision of service delivery</p> <p><b>5.6</b> Encourage team members to contribute feedback in regard to achievement of service and performance targets</p> <p><b>5.7</b> Handle routine problems using appropriate problem-solving techniques</p>	<p><i>Nominate the service teams that are required</i> should include:</p> <ul style="list-style-type: none"> <li>• Ensuring labour budget requirements are complied with</li> <li>• Identifying the need for service delivery at every stage of customer interaction with the host enterprise and/or its staff</li> <li>• Quantifying the size of service delivery teams</li> <li>• Identifying individuals to become team members</li> <li>• Ensuring established teams contain a mix of skills, knowledge and attitudes to deliver the identified service standards</li> <li>• Developing permanent and <i>ad hoc</i> teams suitable to address contingency service provision requirements, including emergency situations, staff illness, unexpected peaks in trade and customer problems</li> <li>• Obtaining agreement from team members, where appropriate, regarding their participation in a nominated team.</li> </ul> <p><i>Oversee the establishment of teams</i> should relate to:</p> <ul style="list-style-type: none"> <li>• Managing the stages of team development, including forming, storming, norm-setting, performing and adjourning</li> <li>• Providing directions, advice and support</li> <li>• Explaining team goals and objectives in relation to service delivery.</li> </ul>

	<p><i>Communicate established service standards</i> may include:</p> <ul style="list-style-type: none"><li>• Providing verbal and written description and explanation of identified service standards</li><li>• Demonstration of service delivery techniques, strategies and procedures</li><li>• Incorporating service standards into staff operating manuals</li><li>• Posting hard copies of service standards in staff areas</li><li>• Adding coverage of required service standards in induction sessions and formal internal staff training.</li></ul> <p><i>Train staff</i> may include:</p> <ul style="list-style-type: none"><li>• Demonstrating service delivery techniques, strategies and procedures</li><li>• Providing opportunities to practice required service delivery standards and procedures</li><li>• Conducting formal and/or informal assessment of staff competency in relation to the delivery of nominated service delivery standards</li><li>• Providing remedial training to team members as required</li><li>• Ensuring only suitable, trained staff are authorised to provide nominated service delivery.</li></ul> <p><i>Monitor team performance</i> may include:</p> <ul style="list-style-type: none"><li>• Observing team members while they are providing service delivery</li><li>• Using objective checklists to evaluate the extent of individual team member compliance with identified service standards</li><li>• Obtaining feedback from the recipients of service delivery</li><li>• Exercising fairness in the evaluation of individual staff performance</li><li>• Ensuring team members are aware of the criteria against which their provision of service delivery is being assessed.</li></ul>
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*Review policies, procedures and standards* may include:

- Establishing regular intervals at which service-related matters must be formally evaluated and reviewed
- Designating responsibility for undertaking formal service delivery reviews
- Providing resources for the scheduled reviews
- Researching service standards that are being implemented by the competition
- Seeking feedback from customers relating to their satisfaction with and expectations of, existing service delivery
- Creating new service standards and/or amending existing service standards on the basis of feedback, research findings and/or emerging necessity
- Re-prioritising nominated service delivery standards
- Participating in accreditation processes.

*Resources to enable the provision of identified service delivery standards* may include:

- Time
- Training
- Physical resources, including technology
- Information.

*Assist team members to resolve customer complaints* may include:

- Intervening when team members appear unable to resolve a customer complaint
- Supporting team members in their dealings with complaints
- Leading by example in the resolution of customer complaints
- Encouraging team members to deal with complaints and difficult customers so as to extend their expertise and build confidence

	<ul style="list-style-type: none"> <li>• Assisting team members in the completion of necessary internal documentation that must be completed following a complaint or other workplace service-related event</li> <li>• Debriefing with team members about difficult customers and situations.</li> </ul> <p><i>Support team members to rectify instances of deficient service delivery may include:</i></p> <ul style="list-style-type: none"> <li>• Providing one-on-one demonstrations, mentoring and advice as required/requested and in a proactive manner</li> <li>• Being approachable so that team members are encouraged to seek assistance</li> <li>• Highlighting the positive action that team members have taken and limiting emphasis on any negatives that may have been involved</li> <li>• Providing information to explain instances where assistance is required, in addition to providing physical demonstration</li> <li>• Arranging top-up training, as required</li> <li>• Arranging for team members to be transferred to other duties, where appropriate, until the required service standards can be demonstrated</li> <li>• Implementing disciplinary and counselling for team members who fail to deliver the required service standards.</li> </ul> <p><i>Monitor the extent to which service delivery targets are achieved may include:</i></p> <ul style="list-style-type: none"> <li>• Adhering to practices that have been explained to team members regarding evaluation of service delivery</li> <li>• Using objective evaluation accompanied by personal observation and reflection to determine levels of service being delivered</li> <li>• Using an external 'mystery shopper' to assist in providing data to use in the monitoring process</li> <li>• Observing team member practices</li> <li>• Seeking feedback from customers and team members</li> <li>• Checking complaints, compliments and accident/damage reports.</li> </ul>
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*Take action to address failure* may include:

- Revising policies, procedures and service standards, including consideration that initial service standards may have been set unrealistically high
- Integrating additional and/or different resources to assist in target achievement
- Re-training team members
- Supplying additional resources, including extra staff
- Re-forming the service delivery team.

*Records relating to service delivery* may include:

- Staff rosters and wage sheets
- Complaints and compliments received from customers
- Written records of personal observations
- Hard copy records of feedback from customers and staff
- Copies of documentation completed by team members to illustrate compliance with paper-based service requirements, including accuracy, correct prices, monitoring of detail, legibility and comprehensiveness
- Accreditation reports.

*Discuss significant instances of failure to deliver identified service delivery standards* may include:

- Describing the context of the situation
- Involving/inviting team members to participate in the discussion
- Supporting the team member in discussions with management
- Developing changes to existing protocols to reduce or eliminate the likelihood of repetition of sub-standard service delivery
- Completing incident reports.

	<p><i>Operational information</i> may include:</p> <ul style="list-style-type: none"><li>• Explanation of the impact of service delivery standards on team members</li><li>• Identification of the impact of service standards on customers</li><li>• Cost of providing current level of service, including labour costs, training, and associated physical resources to support the delivery</li><li>• Opportunities that have been identified for improving or altering service delivery standards without adversely impacting on levels of service delivery</li><li>• Identifying technology that may be able to be used to replace or enhance existing service standards.</li></ul> <p><i>Interpret stated service delivery standards</i> may include:</p> <ul style="list-style-type: none"><li>• Explaining service standards and service levels</li><li>• Prioritising service delivery standards and requirements</li><li>• Defining relevant terminology</li><li>• Clarifying service-related issues.</li></ul> <p><i>Encourage team members</i> may include:</p> <ul style="list-style-type: none"><li>• Motivating individuals</li><li>• Providing examples of opportunities to provide high levels of customer service</li><li>• Demonstrating by example how opportunities for enhancing service delivery can be taken.</li></ul> <p><i>Allocate service delivery tasks</i> may include:</p> <ul style="list-style-type: none"><li>• Nominating individual team members to undertake specified service delivery duties</li><li>• Assisting in staff rosters for customer service delivery duties</li><li>• Assigning extra duties to service team during interactions with customers</li><li>• Delegating duties.</li></ul>
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*Provide feedback* may include:

- Praising team members for their efforts, including recognising and rewarding individual and team efforts
- Advising team members of non-compliance with service delivery standards and monitoring their efforts at remedying the situation
- Passing on instances of customer compliments and complaints.

*Encourage team members to contribute feedback* may include:

- Conducting regular team meetings
- Demonstrating personal preparedness to receive positive and negative information from team members
- Acting on information received
- Representing team members in discussions with management
- Ensuring that team members who contribute feedback are not victimised.

*Handle routine problems* may include:

- Demonstrating sympathy and empathy with team members
- Developing and communicating programmed decisions for routine problems
- Following recognised problem-solving techniques, including identifying the problem, considering options, making a decision, conveying the decision and reviewing the decision
- Factoring in short-term and long-term legal and operational issues
- Referring problems to management, where appropriate.

	<p><b>Assessment Guide</b></p> <p>The following skills and knowledge must be assessed as part of this unit:</p> <ul style="list-style-type: none"><li>• The enterprise's policies and procedures in regard to service delivery, complaint handling, staff supervision, team performance monitoring, disciplining staff, allocating responsibilities and staff meetings</li><li>• Principles of team management and team cohesion techniques</li><li>• Ability to use interpersonal, communication, coaching, feedback, motivation and leadership skills</li><li>• Knowledge of relevant service delivery codes of practice</li><li>• Knowledge of customer service expectations and general industry service delivery strategies and options available and being applied by the competition.</li></ul> <p><b>Linkages To Other Units</b></p> <ul style="list-style-type: none"><li>• Manage and resolve conflict situations</li><li>• Receive and resolve customer complaints</li><li>• Work effectively with colleagues and customers</li><li>• Work in a socially diverse environment</li><li>• Maintain quality customer/guest service</li><li>• Develop and supervise operational approaches</li><li>• Lead and manage people</li><li>• Manage the effective use of human resources</li><li>• Monitor staff performance</li><li>• Provide professional support to business colleagues</li><li>• Work as a tour guide</li><li>• Apply industry standards to team supervision.</li></ul>
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**Critical Aspects of Assessment**

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to service delivery, complaint handling, staff supervision, team performance monitoring, disciplining staff, allocating responsibilities and conducting staff meetings
- Demonstrated ability to develop and verbally communicate a set of written service delivery standards suitable for use in a nominated organisation
- Demonstrated ability to identify staff and individual service delivery responsibilities for a nominated organisation for a given time period and/or a given event or tour
- Demonstrated ability to provide ongoing leadership to a service delivery team in an operational environment including the monitoring, maintenance and improvement of service delivery throughout the nominated period.

**Context of Assessment**

Assessment must ensure:

- Actual or simulated workplace application of service delivery and team leadership.

**Resource Implications**

Training and assessment must include the use of real or simulated industry environments, real people and real or simulated service-related problems and issues.

**Assessment Methods**

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Simulation exercises
- Analysis of written service standards that have been prepared
- Feedback from team members who have been led by the candidate in service-related contexts

	<ul style="list-style-type: none"> <li>• Feedback from customers who have received service delivered by team members who have been led by the candidate</li> <li>• Role plays</li> <li>• Oral and written questions</li> <li>• Third party reports completed by a supervisor</li> <li>• Project and assignment work.</li> </ul>		
	<p><b>Key Competencies in this Unit</b></p> <p><i>Level 1 = competence to undertake tasks effectively</i></p> <p><i>Level 2 = competence to manage tasks</i></p> <p><i>Level 3 = competence to use concepts for evaluating</i></p>		
	<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
	Collecting, organising and analysing information	3	Compiling information and data to use as the basis for revising service standards and/or providing feedback to team members
	Communicating ideas and information	1	Sharing and explaining service standards to team members
	Planning and organising activities	2	Organising team member training in relation to service delivery; scheduling revisions to service standards
	Working with others and in teams	1	Providing support and advice to team members
Using mathematical ideas and techniques	1	Applying statistical parameters to service delivery standards	

	Solving problems	2	Assisting team members to deal with difficult customers and resolve customer service issues
	Using technology	1	Using internet to research matters related to customer service delivery



# Oral questions

<b>Student name</b>	
<b>Assessor name</b>	
<b>Location/venue</b>	
<b>Unit of competency</b>	Build and maintain a team approach to service delivery D2.TCS.CL5.03
<b>Instructions</b>	<ol style="list-style-type: none"> <li>1. Ask student questions from the attached list to confirm knowledge, as necessary</li> <li>2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC')</li> <li>3. Write short-form student answer in the space provided for each question.</li> </ol>

Questions	Response	
	PC	NYC
1. Identify two external factors that can impact service delivery. <i>Weather, environment, competitors, location.</i>	<input type="checkbox"/>	<input type="checkbox"/>
2. What are the three phases of the buying cycle? <i>Pre-purchase, purchase, Post-purchase.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>3. Identify one benefit of implementing service delivery standards.</p> <p><i>Quality maintenance, increased revenue, clear operating procedures for staff, unified approach to service delivery.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>4. Why is it important to get management approval for draft service delivery standards?</p> <p><i>Chance to get feedback and advice, raise awareness of the service delivery standard.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>5. What are three factors that should be considered when writing service standards?</p> <p><i>Clearly stating standard, logical sequence, simple language, include team members feedback, include other stakeholders feedback, include targets.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>



Questions	Response	
	PC	NYC
<p>6. Why is it important to determine the size of a service delivery team? <i>To make sure the service delivery can be achieved to the required standard, cost, alignment to organisational delivery standards.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>7. What happens at the storming stage of team development? <i>The stage of group development when the team clarifies its goals and its strategy for achieving them.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>8. Name two ways to communicate service standards with team members? <i>Email, notice boards, meetings, interviews or any other acceptable response.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>9. Is demonstration an effective form of training? Why?</p> <p><i>Yes. Because it allows team members to see how to perform a task properly.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>10. Identify two ways to monitor team performance.</p> <p><i>Observation, customer feedback, interviews, team member demonstrations, staff feedback.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>11. Why should reviews be conducted regularly?</p> <p><i>Because the delivery service environment changes constantly. New staff, different customer expectations, competitor impact.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>12. Name one type of resource related to service delivery. <i>People, funding/money, equipment, facilities, time.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>13. What is the first stage of responding to a complaint? <i>Apologise</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>14. Identify one way to rectify poor service delivery. <i>Discussing with team member, demonstration, further training, re-reading operating manuals.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>15. Identify an example of service delivery targets.</p> <p><i>On time, within budget, customer satisfaction surveys completed, or any other example of service targets.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>16. Why might service delivery standards be changed?</p> <p><i>Failure to meet standards, changes in environment or technology, customer expectation changes.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>17. Name two types of service delivery records.</p> <p><i>Staff rosters, schedules, training records, operating manuals, action reports, incident reports.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>18. What information does management need in relation to service delivery improvements?</p> <p><i>Identify the issue or area for improvement, evidence and data, solution or suggestion.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>19. Should relevant team members be present or included in meetings with management relating to significant failures in service delivery standards?</p> <p><i>Yes. Provides support for team members and a chance to explain the issue.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>20. Are cost issues an operational factor influencing service delivery?</p> <p><i>Yes.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>21. Why would new staff be required for new service delivery standards?</p> <p><i>New skills required, changes to the service context, new location, new equipment or technology.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>22. What type of vocabulary or language is common in service delivery standards?</p> <p><i>Imperatives/commands, directions, sequencing words first, next, then, and vocabulary specific to equipment or the context such as kitchen equipment, cooking terms.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>23. How can an organisation encourage staff to look for ways to improve service delivery?</p> <p><i>Feedback, recognition and rewards, demonstrating, motivating team members.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>24. Can any staff member be chosen for specific service delivery tasks? <i>Only if they have the necessary skills and training.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>25. How can team members be notified of changes to service standards? <i>Emails, meetings, notes, newsletters, notice boards, interviews.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>26. Identify two types of feedback for team members. <i>Praise, criticism, encouragement, customer compliments/complaints.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
<p>27. Should team members be encouraged to provide feedback about service delivery targets and achievements?</p> <p><i>Yes in order to encourage engagement in service delivery efforts.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>28. Identify a routine problem in service delivery that you have dealt with.</p> <p><i>Any relevant answer appropriate.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>



# Written questions

Build and maintain a team approach to service delivery – D2.TCS.CL5.03

**Student Name:** \_\_\_\_\_

Answer all the following questions and submit to your Trainer.

1. What are three internal factors that affect service delivery standards?

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2. How does a product differ from a service?

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3. What is a 'moment of truth'?

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4. Describe a moment of truth in a service delivery item in your workplace.

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5. What does SMART stand for in terms of objectives, standards or goals?

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6. What are two examples of primary data collection methods for feedback?

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7. Should management be asked for feedback regarding draft service standards?

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8. How can management support draft service standard development?

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9. Why should written service standards be filed carefully?

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10. Who should be included in writing service delivery standards?

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11. What are two factors that affect service team delivery size?

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12. What is the difference between a permanent and a flexible team?

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13. What are the five stages of development of small groups/teams?

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14. What happens at the norming stage?

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15. Why are written service delivery standards important for team members?

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16. Why is concept checking important when training?

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17. How does demonstrating a service delivery standard help team members?

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18. When is remedial training necessary?

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19. If a team member is competent, can they complete the task?

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20. Identify three things necessary in conducting an effective review.

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21. Name three examples of specialised equipment needed for service delivery.

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22. How can you help a team member with a complaint?

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23. How would you assist a team member if they have not delivered service to the required standard?

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24. Identify two targets for service delivery.

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25. Name one way to deal with a failure in service delivery standard.

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26. Identify three types of service delivery records.

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27. What information is necessary to provide to management when suggesting improvements to service delivery?

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28. When discussing serious failures in service delivery standards with management, should a solution be provided?

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29. Name two operational issues that affect service delivery.

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30. Why might new service teams need to be developed?

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31. How can you help team members understand service delivery tasks?

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32. How can rewards encourage team members to improve service delivery standards?

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33. Should personal goals align with team goals?

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34. What is the most effective way to communicate changes to service delivery standards to team members?

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35. Should feedback to team members always be made publicly? Why/why not?

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36. How can you encourage team members to provide feedback?

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37. Describe a routine problem you have dealt with. Explain what it was and what you did to resolve it.

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# Answers to written questions

Build and maintain a team approach to service delivery – D2.TCS.CL5.03

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

**1. What are three internal factors that affect service delivery standards?**

Budget, staff, training, equipment, facilities, policies and procedures.

**2. How does a product differ from a service?**

Products are tangible. Services are intangible.

**3. What is a 'moment of truth'?**

A moment of truth is when a customer forms an impression of a product or service.

**4. Describe a moment of truth in a service delivery item in your workplace.**

Multiple responses possible.

**5. What does SMART stand for in terms of objectives, standards or goals?**

Specific, Measurable, Achievable, Realistic and Time bound.

**6. What are two examples of primary data collection methods for feedback?**

Customer evaluation surveys, simulation, observation.

**7. Should management be asked for feedback regarding draft service standards?**

Yes. Their experience is essential in assisting standards development.

**8. How can management support draft service standard development?**

By agreeing to funding, equipment, standard levels, staffing.

**9. Why should written service standards be filed carefully?**

So they can be found and used easily.

**10. Who should be included in writing service delivery standards?**

All team members, managers and relevant staff.

**11. What are two factors that affect service team delivery size?**

Budget, what the service requires, when the service is required.

**12. What is the difference between a permanent and a flexible team?**

Permanent teams repeat the same tasks. Flexible teams may deliver many different services at different times and places.

**13. What are the five stages of development of small groups/teams?**

Forming, Norming, Storming, Performing, Adjourning/Transforming.

**14. What happens at the norming stage?**

The team establishes its values for how individuals will interact and collaborate.

**15. Why are written service delivery standards important for team members?**

They provide a foundation and record that can be accessed easily.

**16. Why is concept checking important when training?**

It shows that trainees understand what has been taught.

**17. How does demonstrating a service delivery standard help team members?**

Team members can see how to deliver to the required level and ask questions about anything they don't understand.

**18. When is remedial training necessary?**

When a team member is not delivering service at the required level.

**19. If a team member is competent, can they complete the task?**

Yes they can.

**20. Identify three things necessary in conducting an effective review.**

Date of the review, input from relevant people, outline of the process, feedback opportunities, outcome statements, meetings.

**21. Name three examples of specialised equipment needed for service delivery.**

Multiple answers possible.

**22. How can you help a team member with a complaint?**

By intervening if required, providing feedback, training, encouraging the team member, leading by example.

**23. How would you assist a team member if they have not delivered service to the required standard?**

Arrange a meeting, provide feedback, use operating manuals, provide remedial training if necessary, observe and provide feedback.

**24. Identify two targets for service delivery.**

Multiple responses possible. (Numbers of guests, budget, amount of complaints)

**25. Name one way to deal with a failure in service delivery standard.**

Provide remedial training, interview the staff member, provide feedback.

**26. Identify three types of service delivery records.**

Staff rosters, work schedules, training records, action reports, incident reports, feedback surveys.

**27. What information is necessary to provide to management when suggesting improvements to service delivery?**

Background to the issue, solutions, team member feedback, plans, cost estimates, new equipment/technology needed.

**28. When discussing serious failures in service delivery standards with management, should a solution be provided?**

Always, but just a suggestion. Management should be encouraged to provide direction.

**29. Name two operational issues that affect service delivery.**

Staff numbers, staff skills, operating procedures, policies, budget, time, location, service standards.

**30. Why might new service teams need to be developed?**

New business initiatives, changes in the market, competitor changes, staff changes.

**31. How can you help team members understand service delivery tasks?**

By interpreting service delivery standards and explaining them clearly and effectively to team members.

**32. How can rewards encourage team members to improve service delivery standards?**

By recognising their efforts and identifying good work practices.

**33. Should personal goals align with team goals?**

This should always be a goal. Team harmony and unity can be negatively impacted by non-alignment of goals.

**34. What is the most effective way to communicate changes to service delivery standards to team members?**

Trainees own choice but: email, interviews, meetings, SMS, phone calls, newsletters.

**35. Should feedback to team members always be made publicly? Why/why not?**

Not always. Sometimes individual feedback may be more appropriate and effective.

**36. How can you encourage team members to provide feedback?**

By showing that feedback will be listened to and acted upon, by creating various opportunities to provide feedback.

**37. Describe a routine problem you have dealt with. Explain what it was and what you did to resolve it.**

Trainees own response. Multiple responses acceptable.

# Observation checklist

<b>Student name</b>	
<b>Assessor name</b>	
<b>Location/venue</b>	
<b>Unit of competency</b>	Build and maintain a team approach to service delivery D2.TCS.CL5.03
<b>Dates of observation</b>	
<b>Instructions</b>	<ol style="list-style-type: none"> <li>1. Over a period of time observe the student completing each of the following tasks:             <ol style="list-style-type: none"> <li>a) Develop service standards</li> <li>b) Establish service teams</li> <li>c) Work to improve service</li> <li>d) Liaise with management regarding service delivery</li> <li>e) Lead service delivery team</li> </ol> </li> <li>2. Enter the date on which the tasks were undertaken</li> <li>3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise</li> <li>4. Complete the feedback sections of the form, if required.</li> </ol>

<b>Did the candidate</b>	<b>Yes</b>	<b>No</b>
<b>Element 1: Develop service standards</b>		
Identify the internal and external factors impacting on the level of customer service to be provided	<input type="checkbox"/>	<input type="checkbox"/>
Research customer expectations and opinions regarding current level, and expected level, of service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Integrate research findings into draft service standards	<input type="checkbox"/>	<input type="checkbox"/>
Liaise with management to ratify service standards	<input type="checkbox"/>	<input type="checkbox"/>
Produce written service standards for team use	<input type="checkbox"/>	<input type="checkbox"/>

Did the candidate	Yes	No
<b>Element 2: Establish service teams</b>		
Nominate the service teams that are required to support required levels of service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Identify membership of the nominated service delivery teams and oversee the establishment of teams	<input type="checkbox"/>	<input type="checkbox"/>
Communicate established service standards to team members	<input type="checkbox"/>	<input type="checkbox"/>
Train staff in service delivery standards	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element 3: Work to improve service</b>		
Monitor team performance in terms of service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Review policies, procedures and standards relating to service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Allocate resources to enable the provision of identified service delivery standards	<input type="checkbox"/>	<input type="checkbox"/>
Assist team members to resolve customer complaints regarding the provision of service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Support team members to rectify instances of deficient service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Monitor the extent to which service delivery targets are achieved	<input type="checkbox"/>	<input type="checkbox"/>
Take action to address failure to meet service delivery targets	<input type="checkbox"/>	<input type="checkbox"/>
Maintain records relating to service delivery	<input type="checkbox"/>	<input type="checkbox"/>

<b>Did the candidate</b>	<b>Yes</b>	<b>No</b>
<b>Element 4: Liaise with management regarding service delivery</b>		
Discuss suggestions for improvements to service delivery with management	<input type="checkbox"/>	<input type="checkbox"/>
Discuss significant instances of failure to deliver identified service delivery standards with management	<input type="checkbox"/>	<input type="checkbox"/>
Provide operational information regarding service delivery to management	<input type="checkbox"/>	<input type="checkbox"/>
Participate in developing service delivery teams and standards for emerging and new business activities and markets	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element 5: Liaise with management regarding service delivery</b>		
Interpret stated service delivery standards for team members	<input type="checkbox"/>	<input type="checkbox"/>
Encourage team members to take advantage of opportunities to enhance service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Allocate service delivery tasks to team members	<input type="checkbox"/>	<input type="checkbox"/>
Advise team members of changes to service delivery standards and/or targets	<input type="checkbox"/>	<input type="checkbox"/>
Provide feedback to team members regarding the provision of service delivery	<input type="checkbox"/>	<input type="checkbox"/>
Encourage team members to contribute feedback in regard to achievement of service and performance targets	<input type="checkbox"/>	<input type="checkbox"/>
Handle routine problems using appropriate problem-solving techniques	<input type="checkbox"/>	<input type="checkbox"/>
<b>Did the student's overall performance meet the standard?</b>	<input type="checkbox"/>	<input type="checkbox"/>

**Feedback to student and trainer/assessor**

**Strengths:**

**Improvements needed:**

**General comments:**

<b>Candidate signature</b>		<b>Date</b>	
<b>Assessor signature</b>		<b>Date</b>	



# Third Party Statement

<b>Student name:</b>			
<b>Name of third party:</b>		<b>Contact no:</b>	
<b>Relationship to student:</b>	<input type="checkbox"/> Employer <input type="checkbox"/> Supervisor <input type="checkbox"/> Colleague <input type="checkbox"/> Other <i>Please specify: _____</i> <i>Please do not complete the form if you are a relative, close friend or have a conflict of interest]</i>		
<b>Unit of competency:</b>	Build and maintain a team approach to service delivery D2.TCS.CL5.03		
<p>The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.</p> <p>Please answer these questions as a record of their performance while working with you. Thank you for your time.</p>			
<b>Do you believe the trainee has demonstrated the following skills? (tick the correct response]</b>	<b>Yes</b>	<b>No</b>	<b>Not sure</b>
Ability to identify internal and external factors impacting on customer service delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An understanding of research data available to utilise in developing or altering service standard levels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An ability to work with management to develop or improve service standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Produce written service standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nominate and designate team members to a service delivery team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explain established service delivery standards to teams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Train staff effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor team performance in terms of service delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support team members effectively in all aspects of service delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain records effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with management to provide feedback, ideas and solutions for service delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead a service delivery team effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments/feedback from Third Party to Trainer/Assessor:**

--

**Third party signature:**

**Date:**

**Send to:**

## Competency recording sheet

<b>Name of Student</b>		
<b>Name of Assessor/s</b>		
<b>Unit of Competency</b>	Build and maintain a team approach to service delivery	D2.TCS.CL5.03
<b>Date assessment commenced</b>		
<b>Date assessment finalised</b>		
<b>Assessment decision</b>	Pass Competent / Not Yet Competent (Circle one)	
<b>Follow up action required</b> (Insert additional work and assessment required to achieve competency)		
<b>Comments/observations by assessor/s</b>		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
<b>Element 1: Develop service standards</b>						
Identify the internal and external factors impacting on the level of customer service to be provided						
Research customer expectations and opinions regarding current level, and expected level, of service delivery						
Integrate research findings into draft service standards						
Liaise with management to ratify service standards						
Produce written service standards for team use						
<b>Element 2: Establish service teams</b>						
Nominate the service teams that are required to support required levels of service delivery						
Identify membership of the nominated service delivery teams and oversee the establishment of teams						
Communicate established service standards to team members						
Train staff in service delivery standards						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
<b>Element 3: Work to improve service</b>						
Monitor team performance in terms of service delivery						
Review policies, procedures and standards relating to service delivery						
Allocate resources to enable the provision of identified service delivery standards						
Assist team members to resolve customer complaints regarding the provision of service delivery						
Support team members to rectify instances of deficient service deliver						
Monitor the extent to which service delivery targets are achieved						
Take action to address failure to meet service delivery targets						
Maintain records relating to service delivery						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
<b>Element 4: Liaise with management regarding service delivery</b>						
Discuss suggestions for improvements to service delivery with management						
Discuss significant instances of failure to deliver identified service delivery standards with management						
Provide operational information regarding service delivery to management						
Participate in developing service delivery teams and standards for emerging and new business activities and markets						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
<b>Element 5: Lead service delivery team</b>						
Interpret stated service delivery standards for team members						
Encourage team members to take advantage of opportunities to enhance service delivery						
Allocate service delivery tasks to team members						
Advise team members of changes to service delivery standards and/or targets						
Provide feedback to team members regarding the provision of service delivery						
Encourage team members to contribute feedback in regard to achievement of service and performance targets						
Handle routine problems using appropriate problem-solving techniques						
<b>Candidate signature:</b>			<b>Date:</b>			
<b>Assessor signature:</b>			<b>Date:</b>			







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