# Case Study Assessment

## Criteria

### Unit code, name and release number

SITXCCS007 - Enhance customer service experiences (1)

\*\*This unit sits in all the qualifications below. This assessment is not to be amended\*\*

### Qualification/Course code, name and release number

SIT40116 - Certificate IV in Travel and Tourism (1)

SIT50116 – Diploma of Travel and Tourism Management (1)

SIT50316 - Diploma of Event Management (1)

SIT50416 - Diploma of Hospitality Management (1)

\*\*Amend the qualification box before distributing to the student. The information here should only contain the qualification the student is enrolled in\*\*

## Student details

### Student number

### Student name

## Assessment declaration

* This assessment is my original work and no part of it has been copied from any other source except where due acknowledgement is made.
* No part of this assessment has been written for me by any other person except where such collaboration has been authorised by the assessor concerned.
* I understand that plagiarism is the presentation of the work, idea or creation of another person as though it is your own. Plagiarism occurs when the origin of the material used is not appropriately cited. No part of this assessment is plagiarised.

### Student signature and date

Version: *20191002*

Date created: *23 September 2019*

Date modified: *02/10/2019*

For queries, please contact:

Tourism & Experience Services SkillsPoint

Coffs Harbour Education Campus – Coffs Harbour

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RTO Provider Number 90003 | CRICOS Provider Code: 00591E

This assessment can be found in the: [Learning Bank](https://share.tafensw.edu.au/share/access/searching.do?doc=%3Cxml%2F%3E&in=P7ac4831b-430a-4b8d-8b56-f7b32ed5b9cf&q=&type=standard&sort=rank&dr=AFTER)

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## Assessment instructions

Table 1 Assessment instructions

| Assessment details | Instructions |
| --- | --- |
| **Assessment overview** | The objective of this assessment is to assess your knowledge and performance as would be required to determine and meet customer preferences, develop customer relationships, respond to difficult service situations, and take responsibility for resolving complaints. |
| **Assessment Event number** | 2 of 3 |
| **Instructions for this assessment** | This is a case study assessment and it will be assessing you on your knowledge and performance of skills required by the unit.  This assessment is in three (3) parts:   1. Case study scenarios and short answer questions 2. Appendix A & B 3. Assessment feedback |
| **Submission instructions** | On completion of this assessment, you are required to upload it or hand it to your trainer for marking.  Ensure you have written your name at the bottom of each page of this assessment.  It is important that you keep a copy of all electronic and hardcopy assessments submitted to TAFE and complete the assessment declaration when submitting the assessment. |
| **What do I need to do to achieve a satisfactory result?** | To achieve a satisfactory result for this assessment all questions must be answered correctly. |
| **What do I need to provide?** | Pen, note pad and computer logins. |
| **What the assessor will provide?** | Case Study assessment task: SITXCCS007\_AE\_CS\_2of3  Supporting Resources: SITXCCS007\_AE\_CS\_2of3\_SR1 and SITXCCS007\_AE\_CS\_2of3\_SR2  Computer and internet access.  Suitable venue to undertake the assessment. |
| **Due date and time allowed** | This assessment can be done in class or as a take home assessment at your assessor’s discretion. A maximum of three (3) hours is allowed to complete this assessment. |
| **Assessment feedback, review or appeals** | Appeals are addressed in accordance with TAFE NSW Policy. Please refer to your [TAFE NSW Student Guide](https://www.tafensw.edu.au/documents/60140/76288/2018_Student-Guide_WEB.pdf) or [Every Student’s Guide to Assessment](https://www.tafensw.edu.au/documents/60140/76288/every-students-guide-to-assessment-in-tafe-nsw-updated-november-2016.pdf) for more information. |

## Specific task instructions

The instructions and the criteria in the case study below will be used by the assessor to determine whether you have satisfactorily completed the Case Study Scenario. Use these instructions and criteria to ensure you demonstrate the required knowledge.

## Part 1: Case Study Scenarios and Short Answer Questions

To complete this part of the assessment, you are required to read the two (2) case study scenarios below. You are required to provide professional and personalised customer service to each of the customers in keeping with the case study scenarios.

You will need to demonstrate skills in developing customer relationships, responding to difficult service situations and taking responsibility for resolving complaints within your written answers.

The skills demonstrated will be used as part of the overall evidence requirements of the unit.

Once you have read the case study scenario information, you are required to complete the written responses in the spaces provided in this document.  Please ensure to take note of the volume of the response required where indicated.

* Case study scenario 1 requires you to complete written responses to questions 1 – 12.
* Case study scenario 2 requires you to complete written responses to questions 1 – 13.

Once completed you will need to submit this assessment to the assessor for marking.

**Case Study Scenario 1: Dealing with an external customer**

You work in customer service at the front desk in a large 4-star hotel in Sydney.

Many of the mid-week customers are business clientele who are arriving in Sydney for work related meetings, conferences and events. With corporate customers creating such a strong source of revenue, the hotel actively focuses efforts on generating repeat corporate customer bookings.

One key way the hotel does this is by creating promotions and gathering customer feedback with information used to continuously enhance the customer service experience. The mission is to offer a more personalised service to each guest, to better understand and meet corporate clientele needs and expectations and to stay ahead of the competition.

Many companies have set up accounts at the hotel and corporate customers can book rooms directly through to the hotel receptionist for efficiency of service.

**All documents and supporting information required for this Case Study are in Appendix A.**

* You receive a direct customer booking request from Tim Milligan, who will use a company account to pay for his stay. Please review the email in Appendix A.1.
* As part of your organisation’s policies and procedures, you review Tim Milligan’s Customer Profile (see Appendix A.2.).
* You have also received some information about the current promotions campaign, including the customer survey questions that are asked upon check out – please review this information in Appendix A.3.

Using the information provided you are now required to answer the short answer questions below.

**Case Study Scenario 1: Short Answer Questions**

Read each question carefully. Your answer should address all parts of the question.

1. Determine a total of three (3) of Tim Milligan’s preferences, needs and expectations, based on both his e-mail and his customer profile.

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1. Why is it important still to re-confirm the customer’s preferences, needs and expectations? How will you re-confirm these with Tim Milligan?

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1. After looking at the customer’s profile identify at least one (1) appropriate product and one (1) appropriate hotel service to meet Tim Milligan’s specific needs.

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1. Using the table below give at least one (1) example of a way to enhance the customer service experience at each of the key stages of the customer service cycle, consider offering extras and add-ons and providing tailored and additional products and services to meet Tim Milligan’s preferences, needs and expectations.

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| Customer service stage | Example of a way to enhance the customer service experience |
| Upon reservation |  |
| Guest check-in |  |
| During the guest’s stay |  |
| Upon check out |  |

1. Which teams within the hotel will you need to liaise with to ensure both efficient delivery and quality service in regards to Tim Milligan’s;
2. Pre-ordered breakfast room order
3. Soft pillow request

In your answer, detail the method of communication and at what point in time you would notify the hotel’s internal teams.

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1. As per the Customer Service Manager’s team e-mail, there are several promotions running for customers. Name two (2) promotions that you would select to offer Tim Milligan based on his customer profile. Justify your answers.

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1. From your two (2) chosen promotions above, hypothesise how these will build repeat business from Tim Milligan and his company.

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1. Tim Milligan accepted the promotions you offered him above. The Customer Service Manager has requested statistics to measure the success of the promotions campaign and so you seek feedback from Tim Milligan upon check out, following the procedure outlined in the email.

What are two (2) questions you could ask Tim upon check out to gather the information needed?

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1. Following organisational procedures open the excel spreadsheet given in the email you received from the Customer Service Manager (SITXCCS007\_AE\_CS\_2of3\_SR1) and document the feedback Tim Milligan has given you *(attach this spreadsheet as an appendix for assessment purposes).*
2. List two (2) details you would now add to Tim Milligan’s customer profile.

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1. Provide two (2) examples of how the service needs and expectations of Tim Milligan as a corporate customer might differ to those of a family of four who are checking in for a weekend away at The Hotel Montague.

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| Service Type | Corporate customer | Family group |
| **Check-in service** |  |  |
| **Add-ons/ Upgrades** |  |  |
| **Room Type** |  |  |
| **Concierge assistance** |  |  |

1. The Customer Service Manager asks for your advice in designing a customer loyalty program for corporate clients such as Tim Milligan to continue to enhance the service experience.

Recommend a type of loyalty program that could be implemented at The Montague Hotel Sydney. In your answer, justify how your recommendation will:

* Strengthen the customer relationship
* Provide a more personalised service to meet individual preferences

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**Case Study Scenario 2: Dealing with a complaint from an external customer with special needs**

You work in customer service for a boutique wine tour company ‘Grape Time Tours’ and part of your job is to reply to any customer feedback received from the internal customer feedback forms that are sent out automatically to each guest after a tour.

**All documents and supporting information required for this Case Study are in Appendix B.**

* ‘Grape Time Tours’ offers a variety of wine tours as shown in their promotional flyer in Appendix B.1.
* You have received feedback from a customer who recently participated in a tour via a feedback form – please review this at Appendix B.2.
* The company focuses on repeat customers and has a policy on compensation for complaints received, which is outlined in Appendix B.3.
* An email template for internal and external correspondence is provided at Appendix B.4.

Using the information provided you are now required to answer the short answer questions below.

**Case Study Scenario 2: Short Answer Questions**

1. From the customer feedback you have received, what were the customer’s preferences, needs and expectations that were not met? In your answer detail how this has impacted on Sally Ford’s overall tour experience.

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1. From the list of tours that Grape Time Tours offer which one would you have suggested to the customer as a better alternative to suit the customer’s needs? Justify why you have chosen this option.

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1. The Grape Time Tours Customer Complaint Policy details four (4) ways complaints can be resolved. Suggest how you could apply each of the complaints resolutions strategies to Sally Ford’s customer complaint:

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| **Complaint Resolution Strategy** | **Application of strategy in response to Sally Ford’s complaint** |
| Making changes deemed appropriate by the Customer Service Manager, to products, services and contracts. |  |
| Training of staff to understand Grape Time Tours products, services and operations. |  |
| Investigations made around the area of the complaint by the Customer Service Manager. |  |
| Offering adequate compensation in line with Grape Time Tours compensation guidelines. |  |

1. As the Customer Services Manager, you have requested some key figures from the finances team about the cost of compensation and customer lifetime value in order to validate your complaints handling process and compensation guidelines in the next Grape Time Tours executive meeting.

**Below are three (3) key figures the finances team has given you in response to your request:**

* Average Customer Lifetime Value: $620
* Average loss of profits per customer compensation claim: $80
* Average additional cost to company for compensation claim: $20

You are now in the executive meeting and in validating the complaints handling process you are asked the questions listed below. Using the figures given to you by the finance team and the Grape Time Tours Compensation Policy, detail how you would respond to each.

1. What is the potential cost of not offering any compensation for a customer complaint?

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1. What are the benefits of having compensation claims dealt with on the spot by customer service staff, without requiring escalation?

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1. What potential revenue has the company refunded due to customer complaints?

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1. After receiving the financial figures on the lost revenue caused by customer complaints Grape Time Tours wishes to be more proactive to ensure high standards of customer service instead of reacting to customer complaints.

Suggest one (1) way Grape Time Tours could have avoided this complaint.

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1. Following the ‘Reasonable Compensation Guidelines’ and responding to the complaint within your own line of decision making what is the highest level of compensation you can give to Sally Ford to promote customer loyalty and goodwill?

Consider the ‘Grape Time Tour’ offers as part of your compensation calculations and options. You will need to justify your response.

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1. Explain two (2) benefits of giving a voucher or product or service upgrade rather than simply giving the customer a monetary refund to compensate.

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1. Using the e-mail template in Appendix B.4., write a response thanking Sally for her feedback and advising her of the alternative options to compensate for her complaint. In your response, give Sally at least two (2) options available to her as compensation.
2. What is the allocated timeframe for responding to Sally Ford as per Grape Time Tours complaints handling policy?

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1. Define how the e-mail you have written above, and your compensation offerings are turning the initial complaint into an opportunity to demonstrate high quality customer service.

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1. Sally requests that she is not happy with the upgrade you have offered above and instead wants a free multi-day upgraded tour. Would giving Sally a voucher for this be within your compensation guidelines and within your own level of responsibility as the Customer Service Manager?

In your answer detail;

1. Financial constraints of the organisation that need to be considered
2. If there will now be a delay in resolving the complaint due to Sally’s request
3. How you will update Sally on the expected outcomes of her request

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1. At the end of each month as part of your Customer Services Manager duties, you review the complaints register and generate a summary. For this month, you have highlighted regular complaints in terms of food on the basic tour and a growing number of customers with dietary preferences that have not been satisfied with their meals.

In seeking a resolution to these complaints, you write an e-mail to the Operations Manager with your feedback suggesting improvements to the basic “Take me to the Vineyards” tour.

In your email you must;

1. Identify and clarify the service issue
2. Suggest possible solutions to rectify the issue
3. Detail how your solutions will avoid the occurrence of future complaints
4. You have now sent the above e-mail to the Operations Manager, and as part of Grape Time Tours policies and procedures you are required to update the Complaints Management Register with the follow-up actions you have taken.

You can access the *Grape Time Tours Complaints Management Register* in SITXCCS007\_AE\_CS\_2of3\_SR2.

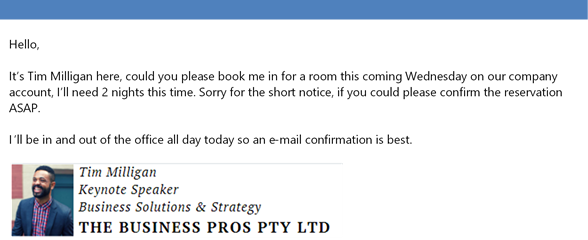
As part of Grape Time Tours organisational standards, you will need to update the following columns:

1. Actions required
2. Date Actioned
3. Employees/ Departments Involved

For the purposes of this assessment, you will need to submit the completed excel spreadsheet as an appendix.

## Part 2: Appendix A

##### 1. Email received from Tim Milligan



##### 2. Customer Profile



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| --- | --- |
| Customer Name | Tim Milligan |
| **Company Account** | # 425679 The Business Pros Pty Ltd |
| **Guest Preferences** | * Ground floor room to access free WIFI in lobby area * Non-smoking room * Room 102 |
| **Special Requests** | * Soft pillows * Sydney Morning Herald delivery |
| **Purchasing Behaviours** | * Orders daily room service breakfast on company account * Prefers to pre-order breakfast at check-in for efficiency |
| **Number of Repeat Bookings** | * 15 |
| **Number of total booked nights** | * 27 |
| **Promotional Services Selected** | *To be detailed as part of the monthly promotions campaign* |
| **Promotional Survey feedback score** | *Rated out of 5* |

##### 3. Promotions Information

**Email from Customer Service**

Hello Team,

As part of our focus this month on enhancing our customer service we have launched a promotions campaign to give guests an opportunity to experience extra service offerings and add-ons as well as gathering further insight into our customer’s preferences and needs.

We are focusing on personalising our customer service with these promotions offered exclusively to our customers through our reception team – that’s you!

To help us achieve these goals please familiarise yourself with the internal promotions flyer which details 6 promotions available for the month-long campaign effective from today.

As the hotel receptionist, we require you to select the appropriate promotions to guests upon check-in and advise each and every guest on suitable promotions. In order to track the success of each promotion and the individual customer preferences you will need to update 2 key systems:

* **Customer Profile on our Hotel Database** –Update ‘Promotional Services Selected’ section *(this will be used to further personalise our service offerings to each guest)*
* **Promotions Success Customer Survey** – The customer survey needs to be filled in and submitted for every guest upon check-out, this feeds into an excel spreadsheet ‘Data from Customer Check Out Surveys’ SITXCCS007\_AE\_CS\_2of3\_SR1 *(this will be used to measure the success of each promotional offer and allow us to gain valuable feedback on our service offerings)*

If you have any questions please ask as your role is vital to the success of this campaign.

Kind Regards,

Megan Ryan

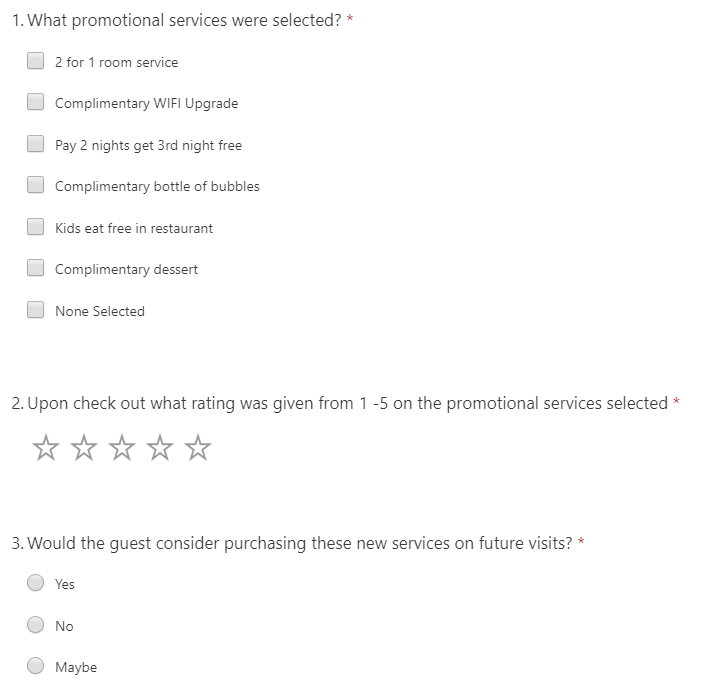
**Customer Service Manager**



**Promotions flyer**



**Promotions success customer survey**

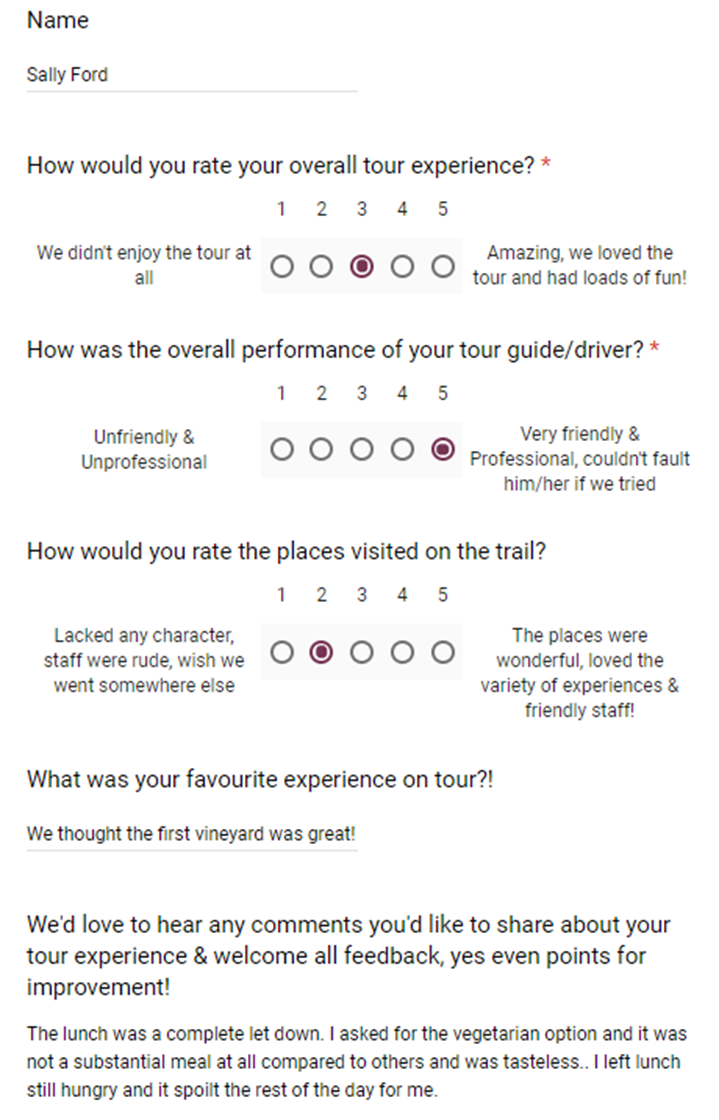


## Part 2: Appendix B

##### 1. ‘Grape Time Tours’ Promotional Flyer



##### 2. Customer Feedback Form



**3. ‘Grape Time Tours’ Compensation Policy**



Grape Time Tours recognises, promotes and protects the rights of individuals or organisations to make a complaint, and promotes and manages complaints in a timely and confidential manner at the first point of contact.

**At Grape Time Tours, we provide services that are:**

* provided with due care and skill
* fit for any specified purpose (express or implied)
* provided within a reasonable time (when no time is set).

Source: ACCC, consumer rights and responsibilities <http://www.accc.gov.au/business/treatingcustomers-fairly/consumers-rights-obligations#dealing-with-customer-complaints>

We value and welcome feedback via complaints as they assist us to improve our products, services and customer service. We will always investigate and remedy customer complaints ourselves, this includes if the complaint involves one of our travel partners. The customer will deal only with us until we have rectified the situation to mutual satisfaction. We will take a pro-active approach to customer feedback. Complaints will be managed in line with Grape Time Tours policies and procedures.

**Customer Complaint Procedures**

All complaints made, verbal or written, will be recorded in the Complaints management register at the time the complaint is made, or as soon as possible afterwards. Our standard is 24 hours.

The register can be accessed here: Grape Time Tours Complaints Management Register

The complaint will be recorded by **the customer service member** who took the details.

When taking a complaint, customer service representative will record full details of the complaint including:

* the date and time of the complaint
* name of complainant
* product or service provision
* details of the problem or issue
* suggestions made by the complainant
* contact details and preferred mode of contact
* service commitments made to the complainant
* copies of any documentation relating to the complaint.

**Informing Customer of Progress**

We strive to resolve all complaints within 48 hours. Written complaints will be acknowledged within 24 hours.

Customers will be given an approximate timeframe at the time they make their complaint. Customers will be informed of the progress of their complaint regularly, especially if there are any delays or changes to what has been agreed. Customers will be informed of any changes to our products or services as a result of their complaint. Where appropriate, customers who have had a complaint resolved will be contacted at a later date to see if they are happy with how their complaint was handled.

**Responding to complaints**

As a responsible company we seek to maintain and enhance our reputation of providing high quality services at all times, this includes how we respond to customer complaints.

We are committed to remaining consistent in the manner in which we receive and manage customer complaints. This includes being consistent, fair and impartial when handling complaints.

All people making a complaint will be treated with courtesy and respect, no matter the nature of their complaint. Where possible, complaints will be resolved at the first point of contact. If the complaint cannot be resolved immediately, the customer will be given a timeframe, a contact person and details of our complaint handling process.

**Complaints can be resolved by:**

* Making changes, deemed appropriate by the Customer Service Manager, to products, services and contracts
* Training of staff to understand Grape Time Tours products, services and operations.
* Investigations made around the area of issue by the Customer Service Manager.
* Offering adequate compensation in line with Grape Time Tours compensation guidelines.

**Compensation Policy**

At Grape Time Tours, we consider the lifetime value of a customer and allow the customer the opportunity to define what they believe to be fair compensation as part of the resolution process.

Following the guidelines set below, we empower customer service staff to resolve the issue in a timely manner and achieve a positive outcome.

**Reasonable compensation guidelines**

* First preference for compensation is to offer a product or service replacement, gift voucher or upgrade to the complainant, which is of equal or similar value of the original purchased. This may be offered on the spot by customer service staff.
* Only as a last resort and when the customer expressly requests a refund is it appropriate to issue a monetary refund
* Customers compensation request is considered fair when the cost of compensation requested is the same value or less than the price initially paid for the service or product in question
* In the case when a customer does not offer an adequate compensation expectation the customer service representative can calculate the compensation limits by:

1. The lowest adequate compensation considered is a gift voucher to the value of the cost of the product or service in question.
2. The highest compensation level **before referral to management** is the point where Grape Time Tours will make a financial loss on the original booking as a result. This point can be calculated by using this equation:

Full price of product or service (as paid by the customer)

–

40% (the cost of service or product to Grape Time Tours)

=

Maximum dollar amount budgeted for customer compensation (before referral to management)

This dollar amount can be applied to the cost price of an upgraded service or product (40% of the total advertised price).

* Wherever possible the customer service representative should offer the customer the highest level of compensation to the complainant to promote customer loyalty and goodwill.
* Following these guidelines, the customer service representative must achieve a satisfactory resolution with the customer within 24 hours or otherwise refer the complaint onto management for escalation.

**Escalation of complaints**

Where possible, we will attempt to resolve complaints at the first point of contact. If we are unable to resolve the complaint at the first point of contact, we will undertake an investigation of the complaint and provide the complainant with our findings. If the usual complaint process cannot resolve a complaint, it should be referred to the Customer Service Manager and the customer will be informed and given an amended timeframe for resolution.

**Reporting and complaints management**

Complaints management should be reported on regularly and all data collected will form part of our ongoing commitment to continuous improvement at Grape Time Tours

Recorded information will include:

* number of complaints received
* amount of time taken to resolve the complaints
* nature of complaints received
* satisfaction levels of customers after complaints have been resolved
* service improvements made as a result of the complaints received.

**4. Email Template**

Dear <Person or Job Role>

Kind Regards,

<Your Name>

**Customer Service <Your Role – Representative/Manger>**



## Part 3: Assessment feedback

*NOTE: This section* ***must*** *have the assessor signature and student signature to complete the feedback.*

### Assessment outcome

Satisfactory

Unsatisfactory

### Assessor feedback

Was the assessment event successfully completed?

If no, was the resubmission/re-assessment successfully completed?

Was reasonable adjustment in place for this assessment event?  
*If yes, ensure it is detailed on the assessment document.*

Comments:

### Assessor name, signature and date

### Student acknowledgement of assessment outcome

Would you like to make any comments about this assessment?

### Student name, signature and date

***NOTE: Make sure you have written your name at the bottom of each page of your submission before attaching the cover sheet and submitting to your assessor for marking.***