



BSBOPS306

Record stakeholder interactions

Assessment 2 of 2

Project



Assessment Instructions

Task overview

This assessment consists of three (3) parts, each part has 3 activities. Read each instruction carefully before typing your response in the space provided.

This project will require you to assume the role of Tyler, a Customer Service Representative at World Traveller, a travel management company based in Melbourne.

Additional resources and supporting documents

To complete this assessment, you will need:

- World Traveller Recording Stakeholder Interaction Policy and Procedure
- World Traveller Customer Management System (CMS)
- Customer Voice Mail recording

Assessment Information

Submission

You are entitled to three (3) attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment (e.g. allowing additional time)
- the evidence gathering techniques (e.g. oral rather than written questioning, use of a scribe, modifications to equipment)

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.





Please consider the environment before printing this assessment.

Scenario

World Traveller is a travel management company primarily specialising in inbound and outbound tours. They are a small business, and they pride themselves on their ability to service a wide range of clients, leisure travellers, business, government delegates and student educational tours between Australia and Asia.

World Traveller is based in Melbourne, Tyler has recently been hired as a Customer Service Representative. Tyler is currently in the final phase of the induction process and ready to be signed off by management for completion. As part of the final stages of the induction process, Tyler has been asked by management to complete the short answer questions to demonstrate knowledge of the requirements of the role.

Case Study

Background information:

World Traveller is a travel management company based in Melbourne, primarily specialising in inbound and outbound tours. They are a small business, and they pride themselves on their ability to service a wide range of clients, leisure travellers, businesses, government delegates and student educational tours between Australia and Asia.

Your role:

You are Tyler, a Customer Service Representative (CSR) in World Traveller. As part of your job role, you are required to record information on customer interactions in the World Traveller Customer Management System (CMS).

You will use information collected from a scenario of three (3) different stakeholder interactions to create records in the World Traveller Customer Management System (CMS).

For each interaction, you will be required to complete the following activities:

- Part A: Prepare to record stakeholder interaction
- Part B: Create a record of stakeholder interaction.
- Part C: Finalise and review recording process

Activity 1 – Scenario

As part of your role as Customer Service Representative, you are required to respond to emails from clients. You receive an email from James Lee, a customer you recently booked on a holiday to Beijing. Read through the email and the response carefully.

James Lee	Re Beijing trip	12.30PM - 13/5/21
To	info@worldtraveller.com.au	
Cc		
Subject: Re Beijing trip		
To World Traveller		
Re: My recent five-day tour to Beijing		
I wanted to treat myself to a fancy vacation and I purchased this trip based on the impressive description of the tour in the travel brochure.		
My enjoyment of the trip was spoiled and shattered by a number of issues; consequently, the tour did not live up to the claims made in the travel brochure.		
The issues faced during the tour are as follow:		
<ul style="list-style-type: none">• Issue 1: The hotel accommodation was awful. It was not the five-star hotel as promised. The interior décor was horrible. Lacquer was peeling off from the walls. The lights were broken, and the floor was filthy. Most importantly, I found a rat crawling around my room and could not sleep well because of its squeaky sounds.• Issue 2: The quantity and quality of food were poor. There was no variety of food, and it was tasteless. Further, the restaurants were unhygienic. That was completely opposite to your claims that those restaurants are 'prestigious'.		
James Lee		

Your response to the customer's email is below:

tyler@worldtraveller.com.au	Re Beijing trip	4.30PM - 13/5/21
To	james.lee@emailme.com.au	
Cc		
Subject: Re Beijing trip		
Dear James,		
I'm sorry to hear that your Beijing trip wasn't as expected. There are a few options for you, but I will need to escalate the complaint to the Customer Service Manager to address the matter effectively. The customer service manager will be in contact with you within 7 days.		
Your complaint reference number is #FMS31077.		

Regards,

Tyler

World Traveller

Part A - Prepare to record stakeholder interaction

This activity requires you to prepare to record an interaction with a World Traveller customer in their Customer Management System (CMS).

Based on the information above you are required to fill in the form below:

1. Collect information about the complaint from the scenario provided above and complete the Customer Feedback Form below according to World Traveller policies and procedures (approximate word count: 80 words).

Assessor Guide

Student must summarise the customer complaint.

Benchmark standard of student responses are provided below.

Customer Feedback Form			
Refer to World Traveller policies and procedures and determine which information should be included before completing this form.			
Purpose of feedback:			
<input type="checkbox"/> Compliment	<input checked="" type="checkbox"/> Complaint	<input type="checkbox"/> Feedback	<input type="checkbox"/> Other
Summary of feedback: <ul style="list-style-type: none">• Tour did not live up description in brochure• Décor horrible• Lacquer peeling off walls• Broken lights• Filthy floor• Rat infestation• Poor quality and quantity of food• Unhygienic• Was not prestigious as claimed			
Action taken: <ul style="list-style-type: none">• Escalated to the Customer Service Manager• Diaried for Customer Service Manager to contact client within 7 days• Complaint reference number is #FMS31077			

What is the name of the World Traveller policy and procedure you referred to when completing this form.

World Traveller Recording Stakeholder Interaction Policy and Procedure

According to the World Traveller policy and procedure what information should you included in this form?

Information that is relevant to stakeholder interaction purpose must include:

- Name/s [of stakeholders]
- Date/s
- Purpose of the interaction
- Details of interaction
- Timelines [dates]
- Responsibilities [who will do what, when and how]
- Follow-up and monitoring of the interaction

Part B – Create record of stakeholder interaction

Continuing from Part A, you need to enter the information from Mr Lee's complaint into the CMS according to the relevant World Traveller policy and procedure.

You are required to:

- Download the File BSBOPS306_02_Project_CMS_V1 from your learning portal.
- Save it to your device as World Traveller Customer Management System.
- Enter information about the stakeholder interaction in the required CMS fields, ensuring that you have entered it into the correct customer file
- Save the changes you make to the CMS, you will upload the final updated version of the CMS along with this workbook at the end of this assessment.

Part C – Finalise and review recording process template

1. With regard to the above scenario, how did you check that the record represents the stakeholder's views, free of bias and opinion and complies with organisational requirements [approximate word count 100 words]

Assessor Marking Guide

Benchmark standards of student responses are provided below.

- Read the complaint carefully
- Use tools to allow you to gather required information e.g the CMS
- Refer to your organisational policies and procedures. In this case the *World Traveller Recording Stakeholder Interaction Policy and Procedure*
- Collect and use data objectively
- Use reliable data sources such as complaint forms, feedback, surveys and focus groups

2. What checks did you conduct to examine the record's completeness and discoverability. [approximate word count 100 words]

Assessor Marking Guide

Benchmark standards of student responses are provided below.

Refer to the *World Traveller Recording Stakeholder Interaction Policy and Procedure*. Check that can be conducted to examine the record's completeness and discoverability include:

Completeness

- Check all required data fields contain data
- Check all entered data is correct
- Check data against any collected information when you collect initial information from the stakeholder (e.g. feedback forms, complaint forms)

Discoverability

Ensure the 'searchable' fields are completed correctly. These must include:

- Name/s [of stakeholders]
- Date/s of activity
- Flight codes
- Event or travel experience code

Activity 2 – Scenario

As part of your role as Customer Service Representative, you are required to monitor and respond to voice mail messages from clients. You receive a voice mail message from Michelle Hamilton, a customer you recently booked on a holiday to Oasis Island.

Download the *Customer Voice Mail recording* file from the learning portal and listen to the voice mail and complete the feedback form provided below.

Hi, this is Michelle Hamilton. I'm just ringing to complain about the holiday to Oasis Island I booked through your office on the 15th of May.

It shouldn't be called Oasis Island, it should be called Terrible Island.

I paid \$125.00 for airport transfers, but they never showed up. I ended up getting a taxi which cost me \$190.00.

I booked the ocean view room in a five star-hotel for three days (the 12th of June – the 15th of June). I specifically requested to have a room with a view of the ocean but was given a garden view instead.

The room service menu did not feature any dishes from the children's menu. I asked the chef if there was anything else he could do, but he refused to make anything that wasn't on the menu. My children hardly ate anything the whole time.

I would like a partial refund for the lack of services.

Part A – Prepare to record stakeholder interaction

This activity requires you to prepare to record an interaction with a World Traveller customer in their Customer Management System (CMS).

You are required to:

1. Double click on the MP4 file to listen to the voice mail
2. Review information provided by the customer voice mail to determine
 - The purpose of the voice mail
 - The context of the voice mail
3. Collect information about the complaint from the scenario provided above and complete the Customer Feedback Form below according to World Traveller policies and procedures [approximate word count: 80 words].

Assessor Guide

Student must summarise the customer complaint.

Benchmark standard of student responses are provided below.

Customer Feedback Form			
Refer to World Traveller policies and procedures and determine which information should be included before completing this form.			
Purpose of feedback:			
<input type="checkbox"/> Compliment	<input checked="" type="checkbox"/> Complaint	<input type="checkbox"/> Feedback	<input type="checkbox"/> Other
Summary of feedback:			
<ul style="list-style-type: none"> • Airport transfer did not turn up, client used taxi at \$190.00 • Client booked Ocean View Room but was given Garden room • Menu did not include any childrens options, chef refused to provide alternatives • Client would like a partial refund 			
Action taken:			
<ul style="list-style-type: none"> • Escalated to the Customer Service Manager • Diaried for Customer Service Manager to contact client within 7 days 			

Part B – Create record of stakeholder interaction

Continuing from Activity 1, you need to enter the information from Ms Hamilton’s complaint into the CMS according to the World Traveller Recording stakeholder Interaction Policy and Procedure.

You are required to:

- Open the World Traveller Customer Management System that you downloaded and saved to your device in activity 1.
- Enter information about the stakeholder interaction in the required CMS fields, ensuring that you have entered it into the correct customer file

- Save the changes you make to the CMS, you will upload the final updated version of the CMS along with this workbook once you have completed this assessment.

Assessor Guide

Student must summarise the customer complaint.

Benchmark standard of student responses are provided in CMS assessor guide.

Activity 3 – Scenario/role-play

As part of your role as Customer Service Representative, you are asked to follow up an outstanding complaint for Stuart Little.

Stuart booked a flight from Melbourne to Sydney on the 12th of June, 2021.

On the 16th of June, Stuart travelled on Jet airlines flight number JK305 from Melbourne to Sydney. Upon arriving at the destination, Stuart went to pick up the luggage, and after waiting for a long time, it never came. He spoke to a representative of Jet Airline who took his information and was told that most likely his luggage would be on a later flight. It never showed up.

After submitting the claim form, he was informed that he would receive compensation for the lost luggage within seven days from the receipt of his complaint. Not only has he had to spend numerous hours filling out the claim form, making phone calls and writing letters to receive a small compensation, but to make matters worse, it now has been more than 15 days, and he still has not received the compensation.

He wants World Traveller to resolve this matter within the next seven days.

Part A – Prepare to record stakeholder interaction

This is a role-play activity which requires you to prepare to record an interaction with a World Traveller stakeholder (Jet Airlines) in their Customer Management System (CMS).

Role-play instructions

The role play/meeting includes two (2) participants, must not exceed five (5) minutes duration and must address all elements of the Observation Checklist below.

In this task you will participate in a role play meeting with your assessor who will play the role of Sam, Customer Service Representative at Jet Airlines.

You will be playing the role of Tyler, Customer Service Representative at World Traveller.

Please contact your assessor via the Discussion Forum to organise a suitable time. Your assessor will then schedule a session via Teams at the agreed time for this role play to occur.

You are required to:

1. Refer to the World Traveller Recording Stakeholder Interactions Policy and Procedure for information on data entry procedures
2. Log into the World Traveller CMS and access Mr Little's client record

3. Review the information regarding Mr Little's complaint
4. Role-play contacting the airline to follow up why Mr Little's complaint has not been actioned
 - a. During the role-play you must confirm with the airline that they have the same customer details on file as World Traveller.

Information for the assessor

There has been a deliberate mistake in the CMS. Mr Little's first name is entered as Stewart, it should be Stuart as per his passport. The assessor will need to role-play not being able to find a complaint under Stewart Little, and ask for a phone number or booking number instead in order to locate the file. When the student provides the phone number or booking number, the assessor must state that this file associate with that number is in the name of Stuart Little. Ask the student to check the client's passport in CMS for the correct spelling (using phonetic alphabet). This should be enough to prompt the student to correct the information in the client file. Once this mistake has been identified, inform the student that the complaint was not actioned due to the incorrect name and will now be prioritised.

5. During the role-play, you will need to demonstrate the following:
 - Reading: Identifies and interprets textual information
 - Writing: Records spoken information clearly and accurately for future reference
 - Oral communication:
 - Presents or requests information using words and non-verbal features appropriate to the audience and context
 - Uses listening and questioning techniques to gather information and confirms understanding
 - Planning and organising: Follows organisational communication practices and procedures
 - Problem-solving: Follows organisational communication practices and procedures
 - Technology: Follows organisational communication practices and procedures

Read the following to familiarise yourself with the two [2] characters for the role-play.

Character	Profile
1. Tyler – Customer Service Representative at World Traveller	<p>Background</p> <p>Tyler is employed as a Customer Service Representative at World Traveller. As per organisational requirements Tylers role includes:</p> <ul style="list-style-type: none"> • Customer service • Solving problems • Resolving conflict • Entering data according to World Traveller Policies and Procedures

	<ul style="list-style-type: none"> • Liaising with suppliers (eg, airlines) <p>Tyler's objectives are:</p> <ul style="list-style-type: none"> • To work with the client • To select the best option • To work with the airline in problem-solving 3 options to assist the client
2. Sam – Customer Service Representative	<p>Background</p> <p>Sam works on the Travel Agents Priority Line at Jet Airlines. As per organisational requirements Sam's role includes:</p> <ul style="list-style-type: none"> • Customer service • Solving problems • Resolving conflict • Entering data according to World Traveller Policies and Procedures • Liaising with suppliers (eg, Travel Agencies)

Assessor Guide Instructions

For satisfactory performance, the assessor must use the **Observation Checklist** (below) to ensure student is demonstrating the required skills. Assessor must provide an overall feedback comment on student's performance.

Observation Checklist

Student name	Assessor must enter the student's name
Name of workplace	World Traveller
Task title	Prepare to record stakeholder interaction
Date of observation	Assessor must enter date of observation

Did the student demonstrate the following during the meeting with project team members?	Yes	No	Comments Assessor must provide specific comments on the student's performance.
1. Oral communication			
Did the student present or request information using language appropriate to the audience and context	<input type="checkbox"/>	<input type="checkbox"/>	
Did the student use active listening (eg Ah ha, I see)	<input type="checkbox"/>	<input type="checkbox"/>	

Did the student use open questions to gather more information, and closed questions to check understanding	<input type="checkbox"/>	<input type="checkbox"/>	
Did the student use paraphrasing to confirm understanding	<input type="checkbox"/>	<input type="checkbox"/>	
2. Problem-solving			
Was the student able to apply problem solving processes to determining the solutions that meet organisational requirements [Spelling error].	<input type="checkbox"/>	<input type="checkbox"/>	
Overall feedback			

Part B - Create record of stakeholder interaction

Continuing from Activity 1, you need to update the information in Mr Little's customer file in the CMS according to World Traveller Recording Stakeholder Interaction Policy and Procedure.

You are required to:

- Open the World Traveller Customer Management System that you downloaded and saved to your device in activity 1.
- Enter information about the stakeholder interaction in the required CMS fields, ensuring that you have entered it into the correct customer file
- Save the changes you make to the CMS, you will upload the final updated version of the CMS along with this workbook once you have completed this assessment.

Assessment checklist:

Students must have completed all questions within this assessment before submitting. This includes:

1	Assessment 2 Project Workbook	<input type="checkbox"/>
2	World Traveller CMS	<input type="checkbox"/>

 **Congratulations you have reached the end of Assessment 2!**