



BSBOPS306

ASSESSOR GUIDE

Record stakeholder interactions

Assessment 2 of 2

Project

Assessment Instructions

Task overview

This assessment consists of three (3) parts. 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.

Case Study

Background information:

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

Your role:

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

You will use information collected from 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 the recording process

Activity 1 - Scenario

As part of your role as a CSR, you must respond to clients' emails. 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 | 12.30 PM - 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 recently embarked on a five-day tour to Beijing, eagerly anticipating a luxurious getaway based on the enticing promises outlined in your travel brochure. Regrettably, my experience fell far short of expectations, leaving me deeply dissatisfied with the tour. | | |
| The issues that marred my holiday experience are: | | |
| Issue 1: Substandard Hotel Accommodation | | |
| Contrary to the advertised five-star standard, the hotel provided dismal accommodation. The interior décor was in disrepair, with peeling lacquer adorning the walls and broken lighting fixtures casting a gloomy | | |

ambience. To add to the discomfort, the floor was filthy, and my room harboured an unwelcome guest in the form of a rat whose incessant squeaking deprived me of much-needed rest.

Issue 2: Poor Quality and Variety of Food

The culinary experience on the tour was a far cry from the promised gourmet affair. Not only was the food lacking in quantity and quality, but the absence of variety made each meal monotonous. Furthermore, the unsanitary conditions of the purportedly 'prestigious' restaurants only compounded my disappointment.

In light of these issues, I urge you to address the glaring disparities between the advertised tour and the reality experienced by your patrons. As a loyal customer, I expected a level of excellence commensurate with your reputation, yet I was sorely disappointed.

I trust you will take prompt and decisive action to rectify these shortcomings and restore faith in your services.

James Lee

Your response to the customer's email is below:

| | | |
|---|--------------------------|-------------------|
| tyler@worldtraveller.com.au | Re Beijing trip | 4.30 PM - 13/5/21 |
| To | james.lee@emailme.com.au | |
| Cc | | |
| Subject: Re Beijing trip | | |
| <p>Dear James,</p> <p>I'm sorry to hear that your Beijing trip wasn't as expected. You have a few options, but I must escalate the complaint to the Customer Service Manager to address the matter effectively. The customer service manager will be in contact with you within seven days.</p> <p>Your complaint reference number is #FMS31077.</p> <p>Regards,</p> <p>Tyler Customer Service Representative World Traveller</p> | | |

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:

Gather information from the scenario provided and then use that information to complete the Customer Feedback Form below. Ensure you consider World Traveller policies and procedures

(Approximate word count: 80 words).

Assessor Instructions

The student must use the information in the complaint email from James Lee to complete the Customer Feedback Form.

The student's response must reflect the sample answer 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">• The tour did not live up to the description in the 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• Diarised for Customer Service Manager to contact client within seven 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 include in this form? Information that is relevant to stakeholder interaction purposes must include: <ul style="list-style-type: none">• 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 a record of stakeholder interaction

Continuing from Part A, you must 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_V1.0 from your learning portal.
- Save it to your device as World Traveller Customer Management System (CMS).
- Enter information about the stakeholder interaction in the required CMS fields, ensuring 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.

Assessor Instructions

Students must use World Traveller's CMS to record the customer complaint.

Benchmark standards of student responses are provided in BSBOPS306_AG_02_Project_World Traveller CMS_V1.0, James Lee tab.

Part C - Finalise and review recording process template

1. With regard to the above scenario, how did you check that the record represents the stakeholders' views, is free of bias and opinion, and complies with organisational requirements?

(Approximate word count 50 - 70 words)

Assessor Instructions

Benchmark responses are provided below.

- Read the complaint carefully
- Used appropriate tools to allow you to gather required information, e.g. the CMS
- Referred to **World Traveller's** organisational policies and procedures. In this case, the *World Traveller Recording Stakeholder Interaction Policy and Procedure*
- Collected and used the data objectively
- Used reliable data sources such as complaint form.

2. What checks did you conduct to examine the record's completeness and discoverability?

(Approximate word count 50 - 75 words)

Assessor Instructions

Refer to the *World Traveller Recording Stakeholder Interaction Policy and Procedure*. Benchmark responses are provided below.

Checks 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 a Customer Service Representative, you must monitor and respond to voicemail 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, listen to the voice mail and complete the feedback form provided below.

TRANSCRIPT OF VOICE MAIL MESSAGE

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 June to 15th June). I specifically requested 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 voicemail.
2. Review information provided by the customer voice mail to determine
 - o The purpose of the voicemail
 - o The context of the voicemail.
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 Instructions

The student must use the information in the Voicemail to complete the Customer Feedback Form. The student's response must reflect the sample answer below.

Customer Feedback Form

Refer to World Traveller's policies and procedures and determine which information should be included before completing this form.

Purpose of feedback:

Compliment

Complaint

Feedback

Other

Summary of feedback:

- Airport transfer did not turn up. The client used a taxi, which cost them \$190.00.
- Client booked Ocean View Room but was given Garden Room.
- The menu did not include children's options, and the chef refused to provide alternatives.
- The client would like a partial refund.

Action taken:

- Escalated to the Customer Service Manager.
- Diarised for Customer Service Manager to contact client within seven days.

Part B - Create a record of stakeholder interaction

Continuing from Activity 1, you must 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 you downloaded and saved to your device in Activity 1.
- Enter information about the stakeholder interaction in the required CMS fields, ensuring 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 Instructions

Students must use World Traveller's CMS to record the customer complaint.

Benchmark standards of student responses are provided in BSBOPS306_AG_02_Project_World Traveller CMS_V1.0, Michelle Hamilton tab.

Activity 3 – Scenario/role-play

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

Mr Little booked a flight from Melbourne to Sydney on the 12th of June 2021.

On the 16th of June, Mr Little travelled on Jet Airlines flight number JK305 from Melbourne to Sydney. Upon arriving at the destination, Mr Little 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 of receiving 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 role-play activity 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 in duration and must address all elements of the Observation Checklist below.

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

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

Key Observation Criteria

During the role-play, you will be required to:

- Identify and interpret textual information
- Record spoken information clearly and accurately for future reference.
- Present or request information using language appropriate to the audience and context.
- Use listening and questioning techniques to gather information and confirm understanding.
- Apply problem-solving processes to determine the solutions that meet organisational requirements.
- Follows organisational communication practices and procedures
- Use the main features and functions of digital tools to complete work tasks.

Participant information

During the role-play, you will demonstrate your skills in interacting with at least one other person. Participants in your role play may be:

1. Friend or family member; or
2. Fellow student

who will play the role of Sam – Customer Service Representative.

Option 1: Friend or family member

Should you complete this task with friends or family members, you must fully brief each participant, providing them with the context of the role play, a role outline to play and the ‘Key Observation Criteria’ so they can prepare for the recording.

Each friend or family member participant will need to state their name and the role they are playing at the start of the recording to provide their consent.

Option 2: Fellow student participant

Please contact your fellow student/s via the Discussion Forum and coordinate your role-play with them directly.

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity with the ‘Key Observation Criteria’ so that they can prepare for the recording.

Student/s will need to state their name and the role they are playing at the meeting at the start of the recording to provide consent.

Recording instructions

Your role play must be recorded with all participants captured in a virtual room using an application such as Zoom, Skype or Teams.

Consent to participate in the recording must be obtained from all participant/s at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, followed by all participants replying with their names and the roles they are playing to provide their consent.

“This session is being recorded for assessment purposes for my course with Colab. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and the role they are going to play.”

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Save the video recording using the following naming convention: Unit Code_StudentName_yymmdd_Activity 3_Role Play. Include this recording as part of your assessment submission.

Participants’ briefing instructions

Participant 1 (Student) - You will be playing the role of Tyler, Customer Service Representative at World Traveller. Read the following to familiarise yourself with your character for the role-play.

| Character | Profile |
|-----------|---------|
|-----------|---------|

| | |
|---|---|
| <p>Tyler – Customer Service Representative at World Traveller</p> | <p>Background</p> <p>Tyler is employed as a Customer Service Representative at World Traveller. As per organisational requirements, Tyler'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, 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 three options to assist the client |
|---|---|

Before the role-play, you must:

- Provide the participant with a copy of the scenario and the character profile for Sam, the Customer Service Representative at Jet Airlines.
- Refer to the World Traveller Recording Stakeholder Interactions Policy and Procedure for information on data entry procedures.
- Log into the World Traveller CMS and access Mr Little's client record.
- Review the information regarding Mr Little's complaint.

During the role-play, you must:

1. Role-play contacting the airline to follow up on **why Mr Little's complaint has not been actioned**.
2. Confirm with the airline that they have the same customer details on file as World Traveller.
3. Confirm when the complaint will be actioned.

Participant 2 (Friend/family member/fellow student) - You will be playing the role of Sam, a Customer Service Representative at Jet Airlines.

| Character | Profile |
|--|--|
| <p>Sam – Customer Service Representative</p> | <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 |

- | | |
|--|---|
| | <ul style="list-style-type: none"> • Liaising with suppliers (e.g., Travel Agencies) |
|--|---|

Before the role-play, you must:

- Read through the role-play scenario
- familiarise yourself with your character for the role-play.

During the role-play, you must:

1. Advise Tyler any inconsistencies in personal information would result in the claim not being actioned. If asked, advise complaints are actioned within seven (7) days if all information is correct.
2. Ask Tyler the following question:

‘Could you please provide us with a phone number, booking number or any other identifying information associated with this lost luggage claim?’

3. Confirm the details with the student you have on file for Mr Little

Name: Mr Stewart Little

Address: 19 House Street Edamville VIC 3595

DOB: 18/07/1959

Phone: 0404 262 356

Email stewart@mousenet.com

Assessor Instructions

This role-play activity requires the student to meet with Sam, a customer service representative at Jet Airlines, to follow up on why a customer complaint from Mr Little has not been addressed.

Mr Little booked a flight with Jet Airlines from Melbourne to Sydney on June 12, 2021. Upon arrival in Sydney on June 16, his luggage was missing. Despite filing a claim and being promised compensation within seven days, he has not received it even after 15 days. He wants World Traveller to resolve this matter within the next seven days.

The student must cross-reference Mr. Little's client record in the World Traveller CMS with the information Jet Airlines has on file. However, there's a deliberate mistake in the CMS: Mr Little's first name is entered as "Stewart" instead of "Stuart," which is incorrect according to his passport. Identifying this mistake should prompt the student to correct the information in the client file.

Use the following Observation Checklist to record your observations while you watch the video. Write a general comment in the Student Assessment Feedback Form where all criteria are demonstrated. Where one or more criteria are not demonstrated to a satisfactory standard, make a specific comment for each criterion requiring re-submission, including constructive feedback in the Student Assessment Feedback Form.

| Observation Checklist <i>(to be completed by the Assessor)</i> | |
|---|-----------------------------------|
| Use this checklist while reviewing the recorded role play: | |
| Did the student... | Satisfactory/Not Yet Satisfactory |
| Identify and interpret textual information. The student must: | |

| | |
|---|---|
| <ul style="list-style-type: none"> • Read the details provided about Mr. Little's complaint and understand the sequence of events. • Recognise the inconsistency in Mr. Little's first name between the World Traveller CMS and his passport. • Make the connection between the information provided about Mr. Little's complaint and the discrepancy in the client record. • Interpret the implications of the mistake and its relevance to resolving the issue effectively. | <p style="text-align: center;"> <input type="checkbox"/> Satisfactory <input type="checkbox"/> Not Yet Satisfactory </p> |
| <p>Record spoken information clearly and accurately for future reference. Present or request information using language appropriate to the audience and context.</p> <p>The student must:</p> <ul style="list-style-type: none"> • Use clear and concise language when documenting the details of Mr. Little's complaint in the CMS, avoiding ambiguity or confusion. • Request clarification from Jet Airlines representatives if any information is unclear or incomplete. • Adapt communication style accordingly, using professional and respectful language | <p style="text-align: center;"> <input type="checkbox"/> Satisfactory <input type="checkbox"/> Not Yet Satisfactory </p> |
| <p>Use listening and questioning techniques to gather information and confirm understanding.</p> <p>The student must:</p> <ul style="list-style-type: none"> • Actively listen to information provided by Sam, the Customer Service Representative at Jet Airlines. • Asking open-ended questions to clarify when the complaint will be actioned. • Clarifying any ambiguities or inconsistencies in Mr. Little's account by asking specific questions for additional context. | <p style="text-align: center;"> <input type="checkbox"/> Satisfactory <input type="checkbox"/> Not Yet Satisfactory </p> |
| <p>Apply problem-solving processes to determine the solutions that meet organisational requirements.</p> <p>The student must:</p> <p>Ensure that World Travellers Recording Stakeholder Interaction Policy and Procedure has been followed.</p> <p>They must ensure they have:</p> <ul style="list-style-type: none"> • Double-checked the details, including spelling of names, date of birth and contact telephone or email addresses. • Documented all dates and times relevant to the steps taken to resolve the complaint. | <p style="text-align: center;"> <input type="checkbox"/> Satisfactory <input type="checkbox"/> Not Yet Satisfactory </p> |

| | |
|---|---|
| <p>Follows organisational communication practices and procedures</p> <p>The student must:</p> <p>Ensure that World Travellers Recording Stakeholder Interaction Policy and Procedure has been followed.</p> | <p><input type="checkbox"/> Satisfactory</p> <p><input type="checkbox"/> Not Yet Satisfactory</p> |
| <p>Use the main features and functions of digital tools to complete work tasks.</p> <p>The student must:</p> <ul style="list-style-type: none"> • Record in the CMS. All dates and times relevant to the steps taken to resolve the complaint and conversations are • Record the role-play meeting and upload it to the LMS | <p><input type="checkbox"/> Satisfactory</p> <p><input type="checkbox"/> Not Yet Satisfactory</p> |
| <p>Assessor Name:</p> | |
| <p>Date:</p> | |

Part B - Create a record of stakeholder interaction

Continuing from Activity 3a, you must update the information in Mr Little's customer file in the CMS according to the World Traveller Recording Stakeholder Interaction Policy and Procedure.

You are required to:

- Open the World Traveller Customer Management System 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. Once you have completed this assessment, you will upload the final updated version of the CMS along with this workbook.

Assessment checklist

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

| | | |
|-------------|---|-------------------------------------|
| Activity 1a | Customer Feedback Form | <input checked="" type="checkbox"/> |
| Activity 1b | Record stakeholder interaction in the CMS | <input type="checkbox"/> |
| Activity 1c | Questions Assessment 2 Workbook | <input type="checkbox"/> |
| Activity 2a | Customer Feedback Form | <input checked="" type="checkbox"/> |
| Activity 2b | Record stakeholder interaction in the CMS | <input type="checkbox"/> |
| Activity 3a | Role-play recording | <input type="checkbox"/> |
| Activity 3b | Record stakeholder interaction in the CMS | <input type="checkbox"/> |

Congratulations! You have reached the end of Assessment 2.

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