

Customer Service Policy and Procedure



Background

Customer Service is integral part of the REINSW Education and Training Team, being the forefront of our initial contact by most of our members, non-members and the public wishing to start a career within the real estate industry.

Purpose

REINSW is the peak industry body and for this reason must provide a high level of customer service to support the members of REINSW, but also support the industry in ways that benefits our members.

Aim

Provide guidance that will support a high level of customer service through different communication streams that members use to communicate with the REINSW training department.

Scope

This policy and procedure will cover all REINSW Training Team Members inclusive of Trainers/Assessor who are contractors representing the REINSW. A customer is an external member of the REINSW, and an internal department of REINSW.

Roles and Responsibilities

The following roles and responsibilities have been identified to ensure that members of REINSW training are aware of their responsibilities to meet the purpose and aim of this policy/procedure.

1.1. General Steps all REINSW Training team members must take with customer service

The following general steps must be displayed by all REINSW Training Team members when providing customer service:

- 1) Show respect – Use the customer's name and actively listen to the customer, paraphrase to indicate to the customer you're understanding their enquiry
- 2) Professionalism – Be friendly and polite. Use appropriate language while avoiding slang or abbreviations. Limit jokes and ensure to that information provided is which the REINSW documentation that can support your conversation
- 3) Be engaging – While being profession, it is important that we connect with our customers by having general but small conversations while you are searching for information to provide to them
- 4) Display confidence – Ensure that the customer feels that you are confident in what you are doing and that they are conducting business with a confident brand. It is important to be honest and advise the customer that you do not know the answer and that you are seeking assistance to help with their enquiry
- 5) Express empathy – Place yourself in the customers shoes, understand where they are coming from and explaining that you understand their frustration. (Do not say I understand how you feel) no one can understand how another person is feeling, but you can understand the frustration they may have
- 6) Being honest – Customers will know if you are lying to them. Be honest and upfront with customers, if you make a promise, keep the promise.

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1.1. Customer Support Officers:

Customer Support Officers are to:

1.1.1. Phones

- a) Ensure that phones are staffed during 0830 and 1700, Monday through to Friday with no downtime unless approved by the Training Manager
- b) Limits wait time of customers to gain access to REINSW Training department by ensuring phone calls are answered within 3-4 rings (80/20 rule. At least 80% of calls answered within 20 seconds) that ensures calls prevent going to voicemail
- c) Answer phones within a professional manner
- d) Manage enquiries by providing accurate and timely information that satisfies the customers enquiry within the first go principle
- e) Provide accurate forms, services and products that meet the customers enquiry
- f) Limit the transferring of customers through the Training Department by ensuring that the enquiry matrix within this policy/procedure is always followed

All calls must be answered with: Thank you for calling REINSW Training, you have (your name), how can we assist you today.

1.1.2. ZenDesk

- a) Ensure that all tickets are answered within the allocated SLA timeframe
- b) Ensure that all tickets have notes recorded regarding the conversations had with the customer
- c) Answer the ticket and provide the relevant information, form, product, or service that will satisfy the customers enquiry on first go principles and the communication medium mirroring technique
- d) Email responses are to be responded to using ZenDesk
- e) Where the ticket has been generated by the Training inbox, search for and replace the training inbox email address with the customers email address
- f) prevent re-allocation of tickets to other REINSW Training team members unless the Customer Support Officer is unable to resolve the enquiry as part of the first go principles, and that the re-allocation is in accordance with the enquiry matrix within this policy/procedure
- g) All actions taken with a customer must be recorded within the ticket
- h) Tickets must not be closed unless the customer has agreed that the enquiry has been resolved, or the time of one (1) week has passed

2. Communication Medium Mirroring:

All REINSW Training Team Members must always mirror the customers initial communication medium unless strictly requested by the customer that another communication medium must be used, for example, a customer may email and request a phone call.

Communication medium mirroring means that a REINSW Training Team Member must:

- a) Return a phone call with a phone call that should be followed up by an email
- b) Return an email with an email

It is expected that REINSW Training Team Members will make and return calls to our customers during REINSW Business hours.

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REINSW Training team members are to pick up the phone and call customers where the customer is having trouble navigate or understand our product and services through email, or the situation looks like that the customer may complain.

Where a complaint has been raised by email or phone, please see the complaints section.

3. First Go Principle

Customer Support Officers must ensure that they apply a high level of customer service that will see the enquiry resolved within the first go of the customer contacting REINSW Training.

First go Principle means that a customer should have a resolution within the first call to REINSW Training, and should not be transferred to another staff member with the team unless information to resolve the enquiry is not available, or it is a complaint by a customer.

To assist with this requirement, Customer Support Officers must use the following tools to apply a high level of customer service using the first go principle:

- a) Frequently Asked Questions (FAQs) cheat cards
- b) Product and Services leaflets that has been approved by the Training Manager
- c) Pre-enrolment Learner information guides
- d) Course Marketing material that has been approved by the Training Manager
- e) Information available on the REINSW websites
- f) Fair Training Website
- g) REINSW approved Business forms
- h) REINSW approved Training forms

Where a Customer Support Officer does not know the answer, or the information is not available, they must not make up the information, advise the customer that they do not know, and follow the flow chart below.

4. Enquiry Transfer

A customer's enquiry must not be transferred to no more than one other team member of the REINSW Training team. This means that the customer should not be talking to anymore than two members of the REINSW Training team where the initial enquiry can not be resolved using the first go principle.

Where a customer's enquiry cannot be resolved with the second member of the REINSW Training team, the enquiry must be transferred to the Training Manager for resolution.

Before an enquiry is transferred to another member of the REINSW Training team, the Customer Support Officer must:

- Make all notes within the ticket and ensure that all ticket details are complete
- Call or email the other REINSW Training member and advise them of the re-allocation of the ticket and provide background information if required
- Where a phone call needs to be transferred, place the customer on hold and call the other REINSW Training team member, advise them of the call and any background information prior to transferring the call to the team member
- Where the other REINSW Training team member is not available to take the call, advise the customer that the member is currently not available, and that you will have them return their call. Generate a ZenDesk ticket, allocate the customer to the ticket, follow the ticket, and allocate to the team member required.

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5. Customer Complaints

All customer complaints must be directed to the Training Manager to manage unless delegated by the Training Manager. REINSW Training Team Members should not try and resolve a complaint unless authorized by the Training Manager to ensure that complaints are managed with the compliance requirements of an RTO.

Team Members should:

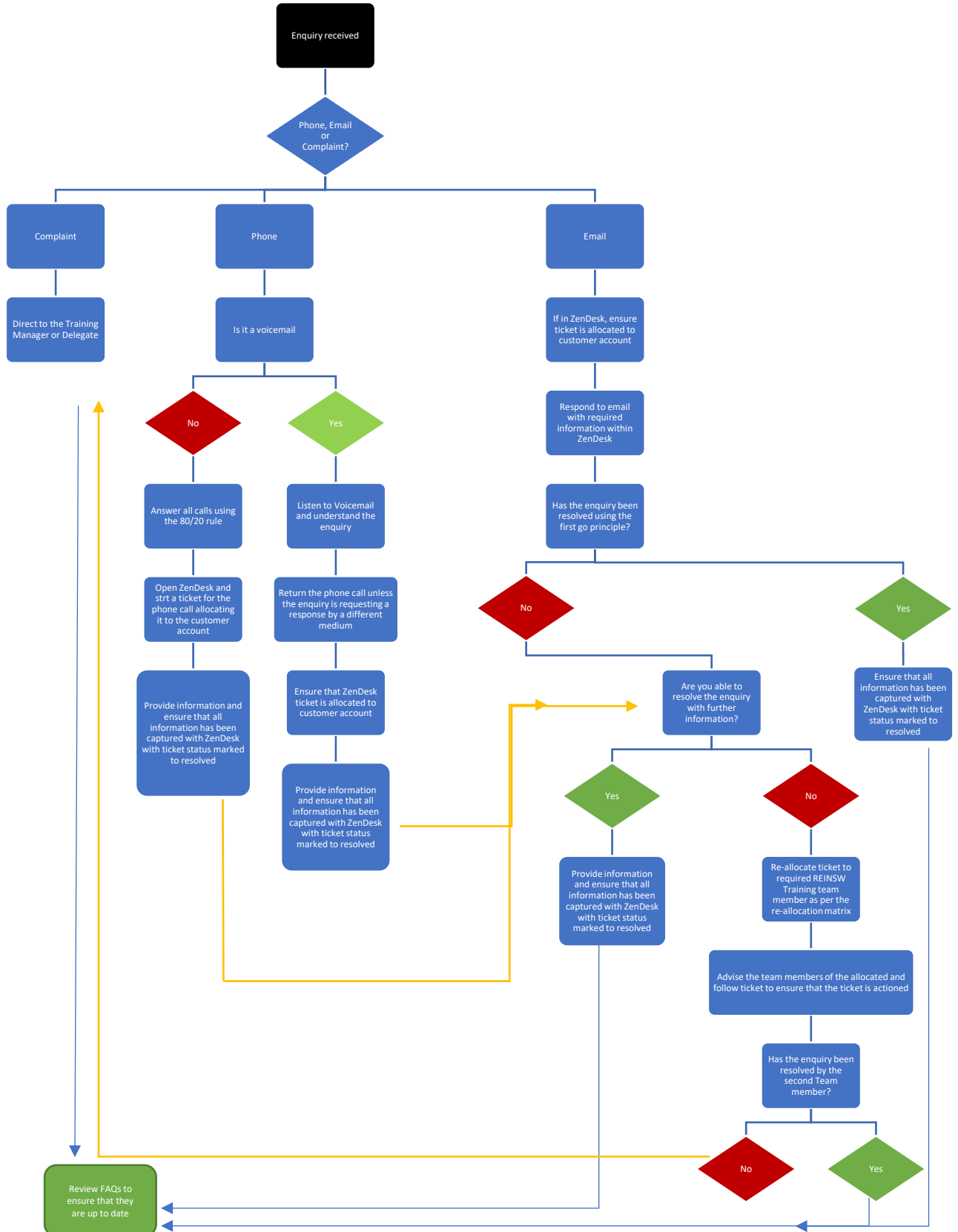
- a) Refer to the complaints policy and procedure
- b) Advise the customer that the Training Manager will be contact with them
- c) Provide them the Ticket reference as their complaint number

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6. Customer enquiry pathway:



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7. Customer Service Re-Allocation Matrix:
Please see following pages.

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Learner Engagement Coordinator	Learner Support Officer	Trainer and Assessors	CPD / Systems Support Officer	Customer Service / Admin Coordinator	Customer Support Officer	Compliance Officer	Training Manager
Learner Centric				Customer Centric		Compliance Centric	
Supervise Learner Support Officers and CPD/Systems Support Officer	Send out Enrolment pack to new Student	Review FTP and advise Learner Support Officer of any changes	Maintain Website in accordance with Policy and Marketing guidelines	Supervise Customer Support Officers	Answer all Phone Calls	Continuous improvement register	Manage all Staff and HR requirements
Sign STS Contracts and return as per FTP Contract	Enrol Student upon enrolment pack being received	Assess LLN assessment and contextualise learning to meet requirements	Manage CPD course enrolments	Resolve issues with staff	Manage Training Inbox	Validation of UoCs	Responsible for overall compliance
Assign student to Learner Support Officer	Allocate course to student within WiseNet / Janison with required UoC	Complete induction with Learner	Setup and support In-House CPD sessions	Escalate issues to Manger where they cannot be resolved	Manage ZenDeck Tickets with SLA	Moderation of UoCs	Complaints management
Submit request for Commitment ID and upload in to WiseNet	Request Commitment ID from Coordinator	Complete training with learner	Ensure rolls are completed by trainer for CPD and data entered	Prepare Financial reporting, coding invoicing / Prepare Refunds for approval by TM	Allocate Tickets as per Customer Service Policy	Maintain Compliance Portfolio of RTO against RTO Standards	Issue resolution
Coordinate Vendor APIs, Issues	Develop FTP and send to Learner Trainer and	Assess Learner work and	Provide support to Customer Support Officers	Submit all traineeship claims progression	Escalate Customer	Provide training to all staff on compliance	Systems and process development and maintenance

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Learner Engagement Coordinator	Learner Support Officer	Trainer and Assessors	CPD / Systems Support Officer	Customer Service / Admin Coordinator	Customer Support Officer	Compliance Officer	Training Manager
Learner Centric			Customer Centric		Compliance Centric		
	Employer for signing and upload and maintain	provide written feedback	in relation to CPD enquiries	payments / Refunds or claim changes	Complaints to Coordinator		
Resolve issues with staff	Assess LLN assessment and advise/send to Trainer of any LLN issues	Upload all evidence into Janison	Ensure that CPD marketing material up to date and report issues to Coordinator	Monitor ZenDesk for SLA compliance, allocation as per customer service policy	Escalate issues with Coordinator	Report to Manager on any compliance breaches	Policies and Procedures
Escalate issues to Manger where they cannot be resolved	Conduct monthly check in appointments with learners. Monitor learner progression	Insert interactions with Learners within WiseNet	Collect and store CPD assessments	Follow up on bad customer ratings and escalate to manager	Update customer details Within Databases as required	Validate certificate issue	Learning Material
Manage SMS and data integrity check and issues – Submit AVETMISS Data – Feb annually	Prepare and seek approval from coordinator to issue learner non-performance letters	Mark of checklist for completed assessment tasks received	Issue CPD Certificates	Re-Issue certificates as per requests received and provide to Customer Support Officer to send out	Record all interactions on ZenDesk	Training and Assessment Strategies	Customer relations

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Learner Centric				Customer Centric		Compliance Centric	
Approve learner letters to be sent out as per policy	Submit to coordinator for extension requests	Advise Learner Support Officer of Competent status of a UoC	Manage ZenDesk Tickets allocated within SLA timeframe	Course number report	Monitor Traineeship inbox and allocate emails to allocated Learner Support Officer or Trainer/Assessor	Maintain compliance with Smart and Skilled contracts	Vendor relations management
Manage extension / Contract variations requests with AAC and STS	Send learner progression reports to Workplace Supervisors	Complete Face-to-face training	Book in trainers for CPD training and remind them of the training 24hrs prior	AQTF Learner and Employer Surveys data collection	Welcome Learners to face to face training held at REINSW house	Trainer matrix and CPD	Manage marketing material
Oversee enrolment process	Induct new learners and provide learning material as required throughout their training	Complete CPD training and mark roll	Prepare CPD proposals and arrange for signing	Other reporting requirements of the Department	Attend to Roll for face-to-face training that is not CPD	Marketing Compliance	Continuous improvement register
New Accredited Training Learner Enquiries	Induct new Workplace Supervisors	Send marked roll to CPD officer	Prepare learning material	Complete random Customer satisfaction calls each month	Support Learner Support officers with scanning and uploading	Manage annual compliance declaration – Mar annually	Business Development – CPD Quoting

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Learner Engagement Coordinator	Learner Support Officer	Trainer and Assessors	CPD / Systems Support Officer	Customer Service / Admin Coordinator	Customer Support Officer	Compliance Officer	Training Manager
Learner Centric			Customer Centric		Compliance Centric		
			required for CPD sessions		documents as required		
Support for S/S Contracts	New Accredited Training Learner Enquiries	Book in / Complete skills assessment with Learner	Process all student cancellations within Janison and request from Learner Support Officer a SOA or Certificate to be issued	Analyse customer service reports and advise manager on gaps and areas of improvement	Process Reissue certificate request forms with Coordinator	Review complaints and provide report to TM on improvement strategies	Develop new products
Report on Accredited Training Learner related report requests from Manager	Manage RPL applications with trainers	Seek from the Workplace Observers the Workplace Observers Report	Send out SMS for face-to-face sessions	Submit Quality Indicator Summary Reporting with Compliance Coordinator – Jun annually	Provide marketing material as requested by customers	Support the review and re-write of learning material	Financial accountability and budgets
Receive rolls from face-to-face training that is not CPD and allocate to Learner Support	Manage Credit Transfer requests	Write new content as SMEs	Establish Zoom links and provide for course number spreadsheet.	Delegate support requests from Learner Engagement Coordinator to Customer Support Officers	Complete delegated tasks to support Learner Support Officers		Management of contract trainers

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Learner Engagement Coordinator	Learner Support Officer	Trainer and Assessors	CPD / Systems Support Officer	Customer Service / Admin Coordinator	Customer Support Officer	Compliance Officer	Training Manager
Learner Centric			Customer Centric		Compliance Centric		
Officer for WiseNet entry							
Complete random Accredited and CPD learner satisfaction calls each month	Notify trainer and assessor of assessments that need marking and assist with upload		Report on CPD Learner related report requests from Manager	Monitor Contract trainer Invoicing	Support coordinator with USI reporting and validation?		Team communication
Manage ZenDesk Tickets allocated within SLA timeframe	Ensure that the trainer/Assessor has Booked in / Completed skills assessment		Cancellation of accredited/CPD students within Janison. Request SOA for accredited Learners with Learner Support Officers. Issue Certificate for CPD Learners	USI Reporting and validation?	Email out training enquiry information pack relevant to enquiry		Stakeholder relationships
Insert interactions with Leainers within WiseNet	Issue completion SOA or Certificates once all checklists have been completed and						Report analysis and manage submissions

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Learner Engagement Coordinator	Learner Support Officer	Trainer and Assessors	CPD / Systems Support Officer	Customer Service / Admin Coordinator	Customer Support Officer	Compliance Officer	Training Manager
Learner Centric			Customer Centric		Compliance Centric		
	evidence has been uploaded						
	Manage ZenDesk Tickets allocated within SLA timeframe						STS funding applications
	Insert interactions with Learners within WiseNet						Manage Quality Assurance Meeting
	Request Cancellation of Learners within Janison with CPD/System support Officer						AAC relationship management

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8. Related Policies and Procedures

- ZenDesk Operating Guide and Procedure
- Complaints Policy and Procedure

9. Related Documentation

- REINSW Code of Conduct

10. Related Legislation / Contracts

- Nil

11. Risk Rating

Category	Consequences	Review Period	Evidence of Understanding
Medium Risk	Non-compliance could result in increased complaints with a decrease in customer sales	2 years	Relevant staff members must be aware and use the document. Staff/Contractors Following the requirements with satisfaction increasing.

12. Policy, Procedure Information

Date Issued:	07/03/2022
Date of last review:	07/03/2022
Date of next review:	07/03/2024
Policy / Procedure owner:	Training Department
Approved by:	Training Manager
Policy/Procedure number:	EAT002