



Customer Service

4. Taking customers' orders

Taking customers' orders is a critical activity for any business. It is in your best interest to make ordering as easy as possible. If it is too difficult to order from you, customers will simply go elsewhere to avoid the hassle.

There are many situations where customers place orders or apply for goods or services that are not immediately available, or are to be used in the future. It may be in a retail environment or a diverse range of industries where specialised goods or services have a lead time before they are available. Such a lead time could involve delivery from a warehouse, or a project that takes days, weeks, months or longer to complete, such as building a house. Other examples include booking an airline ticket or accommodation or the ordering of services such as maintenance, insurance or finance.

In general the ordering process comprises a number of separate stages, including:

- taking the customer's order
- confirming what has been ordered
- confirming completion of the order.

Things customers look for in an ordering process include:

- knowing how and where to order
- being easy to order
- having confidence that the order will be completed as quickly as possible
- being kept informed of the progress
- being told when it has been completed.

Sometimes things can be unavoidably delayed and customers, while not happy generally, accept this – provided you advise them as soon as possible so they can plan accordingly. It is important to remember to make it easy for customers to buy.

To assist you to do this, follow the checklist on the next page.

Checklist - Taking customers' orders

1. Taking the Order

- ▷ Ensure customers know who to deal with for orders.
- ▷ Clearly explain what they are required to do to place an order.
- ▷ Provide a range of options for placing orders with you, such as counters, telephone, in writing, electronic and direct online.
- ▷ When quoting, you must ensure that the full quote is received by the customer within the agreed timeframe.
- ▷ Ensure it is quick and easy for the customer to provide all the necessary details for the order.
- ▷ Don't request unnecessary or irrelevant information from the customer, or information you already have in your records.
- ▷ Regularly confirm with the customer that your records are up-to-date and ensure all information about the customer is kept confidential.
- ▷ Make sure you take all the details of the order correctly.
- ▷ Ensure the 'date of order' is the date the customer placed the order and not the date the order was processed.
- ▷ Provide written confirmation of the order either at the time of the order, or ideally within 2 days of receiving the order.

2. Confirming the Order

- ▷ The order confirmation should include:
 - your reference number
 - reference to any customer order/purchase/job number
 - the name of the customer who placed the order
 - a description of what has been ordered (plain language, with specifications where required)
 - full details of all the costs
 - information about delivery or installation (dates and any customer requirements)
 - a contact number for easy reference if the customer has any queries regarding the order
 - any legal requirements regarding contracts.
- ▷ Ensure the order is fully processed and completed promptly.
- ▷ If there are any changes to the initial order by either you or the customer, ensure you confirm and document these changes.
- ▷ If the goods ordered are not to be delivered for over 2 weeks, then keep the customer informed during the pre-delivery period.
- ▷ If there are delays with the delivery of the goods or services, immediately advise the customer of the new delivery date.

3. Order completed

- ▷ Confirm with the customer that the order has been fully completed to their satisfaction.

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We also provide services at the following locations:

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