

Learning Assessment Guide

Unit Standard 16776 – Version 4

Communicate with customers from a contact centre

Level 3 – 3 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

- Assessment tasks for you to complete
- Verification forms that you will need to arrange for your manager or team leader to complete
- Judgements that your assessor will use to assess your competence

The tasks in this assessment are designed to show your assessor that, in a contact centre setting, you can:

- Greet customers on the telephone and identify their needs and expectations
- Meet customer needs
- Close calls and complete required documentation and follow-up procedures
- Communicate with challenging customers
- Compose written communications in accordance with your organisation's procedures

Special notes relevant to this unit standard

1 Definitions

Contact centre – an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes. Contact centres exist across a wide range of industries. Examples include – banking, insurance, telecommunications, computer companies, retailers and suppliers of services, local government, government agencies, travel industry, market research companies, and charity organisations.

Organisation's procedures – policies, procedures, and/or guidelines currently in use in the contact centre.

Customer – both internal and external customers and refers to the recipient of goods and/or services.

Telephone means both conventional stand alone telephones and computer telephones.

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- The contact centre industry considers the complexity and technology of the contact centre environment to be such that competency in the skills of this unit standard are not able to be fully demonstrated under simulated conditions. Assessment should therefore only be made after a period of practical work experience in a real contact centre.

Assessment Task One – Elements 1, 2, 3 and 4 (P.C. 1.1 – 4.2)

Assessment task one is designed to assess your ability to:

- Greet customers on the telephone and identify their needs and expectations
- Meet customer needs
- Close calls and complete required documentation and follow-up procedures
- Communicate with challenging customers

The task requires you to be observed by your assessor for a minimum of 30 minutes taking live telephone calls in a contact centre.

Observations

Your assessor will be observing and completing the **Observation Checklist** over the following pages, assessing you according to the following criteria:

- Calls are answered and customers greeted appropriately
- Active listening skills are used to establish a rapport with customers
- Customers' needs and expectations are identified and acknowledged
- Options for meeting customer's needs and expectations are explained and courses of action are agreed where appropriate
- All relevant information is recorded correctly
- When dealing with challenging customers:
 - the communication skills used ensure that the customer's requirements are identified
 - the course of action proposed is appropriate for the customer's needs and within the CSR's limits of authority
- Calls are closed appropriately
- Any relevant documentation or follow up is completed correctly
- All the actions observed are in accordance with the organisation's requirements and procedures

Your assessor is also required to complete the attached **Workplace Verification Form** to confirm the observations for task one take place during practical work experience in a contact centre, not in a simulated or classroom setting.

Assessment Task One

Observation Checklist

(to be completed by assessor, manager, supervisor, team leader or coach)

Observation Requirements	Requirements Met
<p>1.1 Call is answered and customer is greeted in accordance with business procedures.</p> <p>Appropriate greetings may include but are not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> standard welcome message <input type="checkbox"/> warmth and smile in voice <input type="checkbox"/> courtesy <input type="checkbox"/> timeliness <input type="checkbox"/> good tone <input type="checkbox"/> good modulation <input type="checkbox"/> good use of grammar <p><i>Tick once you have observed this at least four times and confident that the behaviours displayed are consistent.</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>1.2 Active listening skills are used to establish rapport with the customer and identify their needs and expectations</p> <p>Appropriate listening skills may include but are not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> full attention <input type="checkbox"/> open and closed questions <input type="checkbox"/> clarifying <input type="checkbox"/> reflecting <input type="checkbox"/> paraphrasing <input type="checkbox"/> summarising <input type="checkbox"/> using customer's name <p><i>Tick once you have observed this at least four times and confident that the behaviours displayed are consistent.</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>1.3 Needs and expectations and are identified in accordance with business procedures and customer's agreement.</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>

Continued over

Observation requirements	Requirements Met
<p>2.1 Options for meeting customer needs and expectations are explained, and a course of action agreed where appropriate All are in accordance with business procedures</p> <p>Options may include but are not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> presentation of information <input type="checkbox"/> solutions <input type="checkbox"/> goods and services <input type="checkbox"/> products <input type="checkbox"/> referral to other services <input type="checkbox"/> referral to supervisor <p>Explanation may include but is not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> advantages and disadvantages of the options <input type="checkbox"/> customer education where expectations are unrealistic 	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>2.2 Information is recorded in accordance with business procedures</p> <p>Recorded information may include but is not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> date <input type="checkbox"/> nature of enquiry <input type="checkbox"/> action taken <input type="checkbox"/> follow-up details <p><i>When observing please take copies of the recorded information i.e. copies of database entries and include the entries relating to a specific call you have observed. At least 3 examples to be provided.</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>4.1 When dealing with a challenging customer the communication skills used ensure that the customer's requirements are identified</p> <p>Skills may include but are not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> maintaining calm tone of voice <input type="checkbox"/> acknowledging a dissatisfied customer's grievance <input type="checkbox"/> paraphrasing and checking for understanding <input type="checkbox"/> using open questions <input type="checkbox"/> using prompts <p><i>If there is not the opportunity to observe this then please ensure that this is covered in full during questioning – please refer to task 2 question 1</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>

Continued over

Observation requirements	Requirements Met
<p>4.2 When dealing with a challenging customer the course of action proposed is appropriate for customer needs, is in accordance with business procedures, and within CSR's limits of authority</p> <p><i>If there is not the opportunity to observe this then please ensure that this is covered in full during questioning – please refer to task 2 question 2</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>3.1 Call is closed in accordance with business procedures</p> <p>Closure may include but is not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> confirmation of agreement made <input type="checkbox"/> farewell statement <input type="checkbox"/> use of customer's name <input type="checkbox"/> invitation to use goods and/or services again <input type="checkbox"/> thanks for patronage <input type="checkbox"/> positive verbal language <input type="checkbox"/> next course of action <p><i>Please tick once you have observed and include any other examples in the comments below.</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>
<p>3.2 Documentation is completed in accordance with business procedures</p> <p>Documentation may include but is not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> records <input type="checkbox"/> legal requirements <input type="checkbox"/> diary notes <p><i>Please tick once you have observed and include any other examples in the comments below.</i></p> <p><i>Ask for copies of records and diary notes to back up what you have observed. At least 3 examples to be provided.</i></p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p> <p>Comments:</p>

Continued over

Observation requirements	Requirements Met
<p>3.3 Follow-up is completed in accordance with business procedures</p> <p>Follow-up may include but is not limited to –</p> <ul style="list-style-type: none"> <input type="checkbox"/> service delivery <input type="checkbox"/> internal checks for progress (tracking) <input type="checkbox"/> progress reports to customers by phone, letter, fax, or e-mail; <input type="checkbox"/> “thank you” communications <input type="checkbox"/> apology letters for delays <input type="checkbox"/> service recovery <input type="checkbox"/> promotional communication <p><i>Please tick once you have observed and include any other examples in the comments below.</i></p> <p><i>Ask for copies of any follow up documentation that you observe being completed. At least 3 examples to be provided.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Yes <input type="checkbox"/> No <p>Comments:</p>

Assessment Task One

Workplace Verification Form

(to be completed by assessor, manager, supervisor, team leader or coach)

Name of Learner: _____

Name of Observer: _____

Date of observation: _____

To the observer,

Your signature on this form is to verify that in completion of this assessment the learner was observed during practical experience in a contact centre, not in a simulated or classroom setting.

Comments (if applicable):

Signature: _____

Name: _____

Position in organisation (if applicable): _____

Contact details: Phone: _____

Email: _____

Assessment Task Two – Elements 2 and 4 (P.C. 2.1, 4.1, 4.2)

Assessment task two is designed to assess your ability to:

- Deal with, and meet the needs of, challenging customers

The following questions can be answered either in writing or verbally. Please discuss the most suitable option with your assessor.

If they are to be in writing please use the spaces provided below to record your answers. You may use a separate piece of paper to document your answers, however please ensure that you mark each answer with the question number that it relates to. Please attach all answers securely to this guide and then pass to your assessor for assessment.

Task one questions

1. What process do you follow when dealing with challenging customers?
(Challenging customers may include but are not limited to – angry customers, confused customers, customers for whom English is not the first language)

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2. Please give two examples of when you have dealt with a challenging customer and how you responded in order to ensure that you identified their requirements correctly and proposed an appropriate course of action.

- a.

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- b.

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When would you deem it appropriate to refer a call to your Team Leader or Manager?

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3. When would you deem it appropriate to refer a customer to another service?

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Attach any extra sheets here
Make sure the question numbers are clearly identified

Assessment Task Three – Element 5 (P.C. 5.1, 5.2)

Assessment task three is designed to assess your ability to:

- Compose written communications in a contact centre in accordance with organisational procedures

Workplace Documents

For this assessment you are required to provide examples of four different types of written communications – one of each of the following:

- Email
- Internal memorandum (this could also be an internal email)
- Letter
- Fax

Each document will be assessed according to the following criteria:

- The content of each document is communicated clearly
- The content of each document is communicated accurately
- The content of each document is communicated concisely
- Each document contains correct spelling (100%)
- The content of each document is communicated according to correct rules of English grammar and syntax
- The layout and content of each document complies with your organisation's policies and procedures in relation to addressing and signing, use of jargon, workplace security, level of delegation, level of responsibility, and etiquette.

Your assessor is to complete the checklist on the following page to assess the above, all of which must be satisfied before competence can be awarded for each document produced.

Please also arrange for your manager, supervisor or team leader to complete the attached **Manager Verification Form** to confirm that the work submitted is your own as well as it meeting your organisation's procedures and requirements. This form will need to be handed to your assessor along with each of the documents produced.

Assessment Task Three

Workplace Documents Checklist

(to be complete by assessor)

Document Requirements:	Email	Internal Memo/Email	Letter	Fax
Communication is clear	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Communication is accurate	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Communication is concise	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Document contains correct Spelling (100%)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Communication complies with English rules of grammar and syntax	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Document complies with the organisation's procedures <i>(refer Manager Verification Form)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
(please circle)	C / NYC	C / NYC	C / NYC	C / NYC

Assessment Task Three

Manager Verification Form

(to be completed your manager, supervisor or team leader)

Learner's Name: _____

Organisation: _____

Verifier Name: _____

Position: _____

Contact Ph: _____

This learner is currently being assessed in unit standard 16776: *Communicate with customers from a contact centre*. As part of the assessment the learner needs to provide four workplace documents (email, letter, fax and internal memorandum) to show that they are able to compose written communication in a contact centre.

Please list the four documents below that the learner has asked for you to verify:

Document
1:.....

Document
2:.....

Document
3:.....

Document
4:.....

I verify that:

- The learner produced each of the written documents submitted for evidence
- Each piece of written documentation meets our organisation's requirements and procedures in relation to: (please tick if satisfied or not applicable)
 - Correct addressing and signing of documents
 - Preservation of workplace security and confidentiality
 - Appropriate level of delegation
 - Appropriate level of responsibility
 - Correct industry/organisational etiquette
 - Correct use of industry jargon

I confirm that I am willing to be contacted by the assessor if they have any questions about the learner's work.

Signature: _____ Date: _____

Assessment Guide

The following guide will be used to assess your competence in unit standard 16776:
Communicate with customers from a contact centre.

Task / Element	Evidence required	Judgement
<p><i>Task 1 / Elements 1, 2, 3 & 4</i></p> <p>The learner is observed taking live telephone calls in a contact centre</p>	<p>Calls to be observed for a minimum of 30 minutes during a busy period in a contact centre.</p> <p>Assessor to complete <i>Observation Checklist</i> and <i>Workplace Verification Form</i> included in the Assessor Guide.</p> <p>Learner provides copies of follow up documentation and database entries that relate to the call being observed.</p>	<p>Observations show that the learner is able to communicate effectively with customers.</p> <p>Follow up documentation is completed as per organisational requirements</p> <p>Learner has a working knowledge and understanding of organisational business standards and procedures.</p> <p>Assessor confirms learner's knowledge and understanding and verifies observations took place during actual work experience.</p>
<p><i>Task 2 / Elements 2 & 4 (PC 2.1, 4.1 & 4.2)</i></p> <p>The learner answers a series of questions regarding dealing with challenging customers</p>	<p>The learner provides answers to all questions.</p> <p>Answers can be given verbally or in writing.</p>	<p>Answers provide sufficient and appropriate examples and are in line with the model answers provided.</p> <p>All answers comply with the organisation's procedures.</p>
<p><i>Task 3 / Element 5</i></p> <p>The learner is required to provide four different written communications to be assessed</p>	<p>One example provided for each of the following:</p> <ul style="list-style-type: none"> • Email • Internal memorandum (internal email) • Letter • Fax <p>Workplace documents checklist has been completed by the assessor.</p> <p><i>Manager Attestation Form</i> has been completed and signed.</p>	<p>All four workplace documents have been provided.</p> <p>All criteria's in the <i>Workplace Documents Checklist</i> are satisfied in order to competence to apply.</p> <p><i>Manager Verification Form</i> confirms that the work is the learner's own and complies with the organisation's procedures.</p>