

# Learning Assessment Guide

## Unit Standard 16777 – Version 4

### Seek, evaluate and organise information for action in a contact centre

#### Level 3 – 8 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.

The tasks in this assessment are designed to show your assessor that you can:

- Seek and evaluate information for action in a contact centre.
- Organise information for action in a contact centre.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Observation checklist that the approved observer or assessor will use to record your performance.
- Manager's Verification Form.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

- 1 You may wish to refer to some or all of the following:
  - Companies Act 1993
  - Consumer Guarantees Act 1993
  - Credit Contracts and Consumer Finance Act 2003
  - Fair Trading Act 1986
  - Financial Transactions Reporting Act 1996
  - Human Rights Act 1993
  - Investment Advisors (Disclosure) Act 1996
  - Privacy Act 1993
  - Securities Regulations 1983  
and their subsequent amendments or replacements.
- 2 Definition
  - Company procedures* – policies, procedures, and/or guidelines currently in use in the contact centre.
  - 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.

3 Sources of information may include but are not limited to

- correspondence
- databases
- libraries
- suppliers
- international and national standards
- media
- magazines
- periodicals
- internal and external publications
- colleagues
- seminars
- customers
- internet
- intranet

Information may be stored on computer systems and/or in manual record systems.

4 The contact centre industry considers the contact centre environment to be such that competency in the skills of this unit standard are not able to be 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 and 2 (P.C's 1.1;1.2;1.4;1.5;1.6; 2.3;2.4)

### Introduction

Assessment task one is designed to assess your ability to seek and evaluate information for action in a contact centre.

Range: typical methods of access may include but are not limited to:

- email
- mail
- magazines
- manuals
- bulletin boards
- facsimile
- telephone
- video
- PC networks -LAN or WAN,
- internet
- intranet

This task is also designed to assess your ability to organise information for action in a contact centre.

### Instructions

- Answer the following questions. By arrangement with your assessor, task one could be completed verbally. In this situation your assessor will record your answers for moderation purposes.
- Your assessor may ask you further questions in order to gain clarification or sufficiency of evidence.

The completed assessment for task one will include:

- Answers to questions.
- Assessor's notes where relevant.

## Assessment Task One Questions

(To be completed by the learner)

Name of learner: \_\_\_\_\_

Name of assessor: \_\_\_\_\_

Date: \_\_\_\_\_

Please refer to your organisation when answering these questions.

1. What sources of information do you use in your organisation? *(P.C. 1.1)*

.....

.....

.....

.....

.....

.....

2. How do you ensure their completeness, accuracy and reliability? *(P.C. 1.1)*

.....

.....

.....

.....

3. What method(s) do you use to access the information? *(P.C. 1.4)*

.....

.....

.....

.....

4. With reference to information sources you identified in question 1 and methods of access in question 3, how are they reviewed for their cost-effectiveness and usefulness? How is the review recorded? *(P.C. 1.2)*

.....

.....

.....

.....

5. How would you improve access to the information sources that you use? (P.C. 1.5)

.....  
.....  
.....  
.....

6. How do you store and dispose of information in your organisation? (P.C. 2.4)

.....  
.....  
.....  
.....

7. How is the information used reviewed for its effectiveness, and how do you make recommendations for improvement?(P.C. 2.3)

.....  
.....  
.....  
.....

8. What type of conclusions do you draw from the information that you access? (P.C. 1.6)

.....  
.....  
.....  
.....



Use extra sheets if you need more space to answer the questions  
Make sure each question is clearly identified  
Attach extra sheets here

## Assessment Task Two – Elements 1 and 2 (P.C 1.1 – 2.4)

### Introduction

Assessment task two is designed to assess your ability to seek and evaluate information for action in a contact centre.

Range: typical methods of access may include but are not limited to:

- email
- mail
- magazines
- manuals
- bulletin boards
- facsimile
- telephone
- video
- PC networks -LAN or WAN,
- internet
- intranet

This task is also designed to assess your ability to organise information for action in a contact centre.

### Instructions

- In this task your assessor or an approved observer will observe you accessing information. They will use your answers to Task One, and the following **Observation Form**. They may ask you for further information to clarify points or to gain sufficient evidence.
- Both soft and hard copy information sources should be used.
- You must produce the **Manager Verification Form** signed by your manager or team leader to confirm that you have accessed the appropriate information sources.
- You must also produce the **Workplace Verification Form** signed by your manager or team leader to confirm the observations took place during real work experience in a contact centre, not in simulated or classroom setting.

### The completed assessment for task two will include:

- Assessor's notes where relevant.
- The completion of the '**Observation Checklist**' by the assessor or approved observer.
- Completed and signed **Manager Verification Form**
- Completed and signed **Workplace Verification Form**

## Assessment Task Two – Observation Checklist

(to be completed by assessor or approved observer)

Name of learner: \_\_\_\_\_

Name of observer / assessor: \_\_\_\_\_

Date of observation: \_\_\_\_\_

Please indicate if the learner has met the criteria. Use the space to add comment for feedback to the learner and for moderation purposes.

The learner has:	Observer comments	Yes / No
Identified sources of information that is complete, accurate, reliable and appropriate to the needs of the business.		
Reviewed information sources and methods of access. The review is recorded.		
Accessed information in an appropriate manner.		
Implemented and evaluated suggestions for the improvement of access to information sources.		
Has drawn relevant conclusions from the information accessed.		
Supplied the customer service representatives with complete, accurate and accessible information.		
Has collated and categorised the information in a clear and easily understood format.		
Learner has reviewed the information regularly. Recommendations for improvement have been made in line with company policy.		
Has stored and disposed of unwanted information in accordance with company procedures.		

Assessor/Observer Signature:.....

## Assessment Task Two

### Manager Verification Form

(to be completed by your manager or team leader)

(Name of learner) \_\_\_\_\_ is currently being assessed toward Unit Standard 16777: *Seek, evaluate and organise information for action in a contact centre.*

Your signature on this form is verification that the information the learner has sourced and used meets the requirements of the organisation.

Comments

Manager Name: .....

Signed:..... Date: .....

Position in organisation: .....

Contact details: Phone:.....

Email: .....

Thank you for your assistance

## Assessment Task Two

### Workplace Verification Form

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

(Name of learner) \_\_\_\_\_ is currently being assessed toward Unit Standard 16777: *Seek, evaluate and organise information for action in a contact centre*.

Your signature on this form is verification 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):

Observer Name:.....

Signed: ..... Date: .....

Position in organisation: .....

Contact details: Phone:.....

Email:.....

Thank you for your assistance

## Assessment Guide

These are the evidence and judgements that your assessor will use to assess your competence in unit standard 16777.

Task / Element	Evidence required	Judgement
<p><i>Tasks 1 &amp; 2 / Element 1</i></p> <p>This task involves the learner answering questions concerning accessing and evaluating information at their call centre.</p> <p><i>Performance Criteria Covered:</i> 1.1, 1.2, 1.3, 1.4, 1.5, 1.6</p>	<p>Answers to questions.</p> <p>Observation Checklist.</p> <p>Verification Form.</p> <p>Assessor's notes where relevant.</p>	<p>The learner gives sources of information that are complete, accurate and reliable. The information itself must also be current, reliable and relevant to the needs of the organisation.</p> <p>The learner reviews the information sources and methods of access and considers their usefulness and cost-effectiveness. The results of the review are recorded.</p> <p>The learner uses methods for accessing the information that are appropriate and relevant to the priorities of the business.</p> <p>The learner identifies methods for reviewing the information sources. Suggestions for improvement are further evaluated and acted upon.</p> <p>The learner draws appropriate conclusions from the information sourced.</p>
<p><i>Tasks 1 and 2 / Element 2</i></p> <p>This task involves the learner organising information for action in a contact centre.</p> <p><i>Performance Criteria Covered:</i> 2.1, 2.2, 2.3, 2.4</p>	<p>Completed Observation Checklist.</p> <p>Completed Verification Form.</p> <p>Assessor's notes where relevant.</p>	<p>The learner is observed organising and categorising information for customer service representatives. The information is accurate, complete and accessible, and in a clear and easily understood format.</p> <p>The information is reviewed regularly for its effectiveness. The learner records their recommendations in line with organisational procedure.</p> <p>The learner stores and disposes of information in accordance with organisational procedure.</p>