

# Learning Assessment Guide

## Unit Standard 16779 – Version 4

### Assist customers with account inquiries in a contact centre

#### Level 3 – 4 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:

- tasks for you to complete
- verification form for your manager to complete should your observer not be your immediate team leader or manager
- the observation checklists
- assessment results that the assessor will use to assess your competence.

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

- 1 identify and clarify customer account inquiries in a contact centre
- 2 satisfy customer account inquiries in a contact centre.

## Assessment Task One – Elements 1 and 2

### Observation

This task requires you to be observed within a live contact centre environment and can be carried out by your assessor or an approved observer. The approved observer should not be a colleague at the same level within the organisation as you but a person who has a higher level of authority, for example a Manager, Team Leader or Coach. Please discuss this with your assessor as to the most suitable option.

A minimum of 3 calls is required in order to show competency. If the calls are being observed by an assessor who is not your team leader or manager then a manager's verification form will also need to be completed to confirm consistency. A copy of this form is included in this guide.

You will be observed in the following areas:

- correctly identifying the customer
- receiving and verifying the inquiry through further questioning when required
- obtaining further information where necessary to fully establish the nature of the inquiry
- the information that is required by the customer is retrieved according to company procedures and systems
- the information provided is relevant to the inquiry and will not give rise to repeat inquiries
- the information is conveyed in an efficient and polite manner
- if the information is not available immediately then you inform the customer of how and when it will be supplied
- if the inquiry was beyond your scope of authority that you refer it on to the appropriate authority

Please ensure that you have completed all the required documentation and follow up.

Please also refer to the observations checklists that are included at the end of this guide.

## Task 1 – Workplace Documents

You will need to provide documentation related to at least three customer inquiries that you have handled recently. Documents can include screen dumps of database entries, fax, e-mail, letters or any other documentation that related to a customer account inquiry.

The documents should provide evidence that you:

- identified the customer and their inquiry
- assessed the customer's account and retrieved the required information
- conveyed the relevant information to the customer
- completed any required follow up actions.

These should all be completed according to organisational requirements.

**In order to successfully complete this task the following evidence must be provided to your assessor:**

- three inquiries observed and copies of the observation checklists provided
- if the observer is not your direct team leader or manager then a completed manager verification form is required
- a minimum of 3 follow up documents that relate to the calls being observed and can include; database entries, fax, letter, e-mail.

Copies of the Observation Checklist and Manager Verification Form can be found at the end of this guide.



## Manager Verification Form – unit standard 16779

<b>Name of learner:</b>	
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This learner is currently being assessed toward unit standard 16779 – Assist customers with account inquiries in a contact centre. As the learner’s manager/team leader your knowledge of the learner is sought to verify consistency in the areas required.

Please complete the following and pass this to the learner or the 16779 assessor.

1 How often do you observe the learner in their normal work? (please circle)

**Daily                      Weekly                      Monthly**

2. Have you observed the learner receiving and actioning at least three customer inquiries using organisational procedures? (please circle)

**Yes                      No                      Don't Know**

Please complete the following and use the grading scale to state the learner’s overall performance in the areas required. Please use the space provided at the end of the form to add additional comments.

**The ratings are:** (please circle the appropriate one)

Never                      Rarely                      Sometimes                      Often                      Always  
**1                      2                      3                      4                      5**

1. Does the learner identify the customer and their inquiry?

**1                      2                      3                      4                      5**

2. Does the learner access the customer account information in order to assist with their understanding of the inquiry?

**1                      2                      3                      4                      5**



## Observation Checklist

### Inquiry 1 through to 3

P.C	Observation Criteria	Inquiry 1	Inquiry 2	Inquiry 3
<i>Please include any notes that are appropriate from the observation. If the performance criteria are not displayed during the observation then please state this.</i>				
1.1	Did the learner correctly identify the customer as per workplace requirements?			
1.2	Did the learner receive the inquiry and verify through further questioning as per workplace requirements?			
1.3	Did the learner access the customer account information according to company systems and procedures?			
1.3	If required was further information obtained from the customer as necessary to fully establish the nature of the inquiry?			
2.1	Is the information required by the customer retrieved according to company systems and procedures?			
2.2	Is the information provided relevant to the enquiry and conveyed in a manner that will not give rise to repeat inquiries?			
2.2	Is the information conveyed in an efficient and polite manner?			
2.3	If the information could not be supplied immediately did they inform the customer of how and when the information would be supplied?			
2.4	If the inquiry and/or information were beyond the scope of authority of the learner, did they refer it to the proper authority?			
2.5	Did they complete the required documentation and follow up?			

Observers Signature:

Observers Name and Position:

Date Observation took place:

## Assessment Results

These are the judgements that your assessor will use to assess you.

Is the learner able to identify and clarify customer account inquiries in a contact centre?	Yes	No	
Is the learner able to satisfy account inquiries in a contact centre?	Yes	No	
Are the responses from the learner's manager or team leader on the manager verification form all 4 and 5's?	Yes	No	
Do the workplace documents supplied by the learner comply with the checklist?	Yes	No	N/A
Are the answers to task two questions complete and correct?	Yes	No	
Do the responses demonstrate an understanding of the process surrounding dealing with customer account inquiries and comply with workplace requirements?	Yes	No	