

Learning Assessment Guide

Unit Standard 16780 – Version 4

Respond to in-bound calls relating to marketing campaigns 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.

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

- prepare to respond to in-bound calls relating to a marketing campaign.
- process in-bound calls relating to a marketing campaign.
- record the results of in-bound calls relating to a marketing campaign.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Manager or Team Leader Verification form and Observation Feedback form.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

- References may include but are not limited to:
 - Code of Banking Practice, Third Edition December 2002; available at www.nzba.org.nz
 - Companies Act 1993
 - Consumer Guarantees Act 1993
 - Credit Contracts and Consumer Finance Act 2003
 - Fair Trading Act 1986
 - Financial Transactions Reporting Act 1996
 - Health and Safety in Employment Act 1992
 - Human Rights Act 1993
 - Investment Advisors (Disclosure) Act 1996
 - Privacy Act 1993
 - Securities Regulations 1983

— and their subsequent amendments or replacements.

- A contact centre communicates between organisations and customers using live voice telephony and/or information technology. 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 charitable organisations.
- A call guide is a prepared script, usually provided by the company, and may be read out exactly as it is to the customer by the contact centre operator.
- Campaign procedures refers to all company procedures relevant to a particular campaign. This may include general company procedures as well as campaign-specific procedures, and, where used, the call guide.
- A credit check refers to customers' access to credit and is carried out according to company policy by authorised personnel.
- In-bound calls are calls received at a contact centre, and may relate to an inquiry or a request to purchase a particular product or service.
- A marketing campaign is a campaign to provide callers with information, or to promote products or services.
- Campaign results are usually recorded by computer database according to the client's campaign recording requirements.
- Evidence can relate to a campaign designed to provide information, or to a campaign designed to market goods or services.

Assessment Task One – Element 1

Introduction

You must prepare for a range of inbound telemarketing calls.

Answer the questions, and then ask your team leader or manager to complete the verification form.

If you need more information about communication skills you can search the web for free online resources, for example:

http://www.newconversations.net/communication_skills_workbook_summary_and_toc.htm

Assessment task one is designed to assess your ability to identify the following:

- The details of campaign objectives, procedures, and the call guide, and discuss and clarify their content with the team leader or manager.
- The details of the campaign information to be conveyed to customers, and/or the goods or services to be promoted.
- The operational boundaries in dealing with customers. These must be agreed to by the team leader or manager

Instructions

- Read through all the information and familiarise yourself with the tasks and instructions.
- You can use separate sheets of paper to answer the questions.
- Contact your assessor to clarify anything you are unsure about.
- Answer all the questions to complete the task.
- Ask your team leader or manager to complete the verification form
- You may give verbal answers to the questions.
- Grammar, spelling and punctuation are not assessed for the written questions but information must be clear.
- If your assessor is not sure of your answers they may ask you to explain further.
- Make sure you follow any relevant legislation as stated in the special notes.
- Follow and refer to any relevant organisational procedures (formally documented instructions in the workplace which are available to you and the assessor).
- Contact your assessor when you have finished the assessment task.
- Make sure you keep a copy of your completed assessment if you are mailing the original copy to your assessor.

Questions

Question 1

Firstly, identify what the campaign objectives are. Make sure you know the procedures and are familiar with the call guide. Write down the details below and then discuss and clarify them with your team leader or manager.

Campaign objectives:

Procedures you need to use and why they are used:

The call guide objectives:

Question 2

Write down the campaign information that you must communicate to customers, and/or the goods or services you must promote.

Question 3

What limits are there on what you are expected to do when dealing with customers? Discuss this with your team leader or manager and write what you agreed to here.

Also ask your team leader or manager to complete the verification form.

Assessment Task One – Element 1

Introduction

You must process and record a range of inbound telemarketing calls.

Your assessor or an approved observer will observe you making and recording the calls.

If you need more information about communication skills you can search the web for free online resources, for example:

http://www.newconversations.net/communication_skills_workbook_summary_and_toc.htm

Assessment task two is designed to assess your ability to perform the following tasks in accordance with campaign procedures:

- Greet customers.
- Receive customer details and requirements efficiently and politely.
- Process enquiries and/or the provision of products and services. Depending on the nature of the campaign, processing may include:
 - conveying information to the customer
 - discussion and agreement on payment options
 - recording order
 - discussing delivery details
 - forwarding order to dispatch or delivery personnel
 - arranging credit checks
 - preparing credit card charges
 - referring inquiries beyond the scope of the CSR to appropriate personnel
 - lead generation
 - cross-selling
 - up-selling.
- Close calls and, where information is to be supplied to the customer at a later stage, provide prompt follow-up according to campaign procedures.
- Record results according to campaign procedures and systems.
- Record and report difficulties encountered.

Instructions

- Read through all the information including the observer feedback form and familiarise yourself with the tasks and instructions.
- Contact your assessor to clarify anything you are unsure about.
- Ask an approved assessor or observer to observe a range of your calls and then they will complete the observer feedback form.
- Make sure you follow any relevant legislation as stated in the special notes.
- Follow and refer to any relevant organisational procedures (formally documented instructions in the workplace which are available to you and the assessor).

Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 16780.

Element	Task	Evidence required	Judgement
Element 1	1 Q1	Learner identifies details of campaign objectives, procedures, and call guide and discusses and clarifies their content with the team leader or manager. Team leader/manager verification form completed.	Details are complete and feasible. Team leader/manager verifies with signature.
	Q2	Learner identifies details of the campaign information to be conveyed to customers, and/or the goods or services to be promoted.	Details feasible and complete.
	Q3	Learner identifies operational boundaries in dealing with customers and gains the agreement of the team leader or manager. Team leader/manager verification form completed.	Boundaries realistic. Team leader/manager verifies with signature.
Element 2	Two	Learner greets customers in accordance with campaign procedures. Learner receives customer details and requirements efficiently and politely in accordance with campaign procedures.	Observer feedback form has 'yes' ticked. Observer feedback form has 'yes' ticked.

Element	Task	Evidence required	Judgement
		<p>Learner processes enquiries and/or provision of products and services in accordance with campaign procedures.</p> <p>Range: depending on the nature of the campaign, processing may include but is not limited to – conveying information to the customer, discussion and agreement on payment options, recording order, discussing delivery details, forwarding order to dispatch or delivery personnel, arranging credit checks, preparing credit card charges, referring inquiries beyond the scope of the CSR to appropriate personnel, lead generation, cross-selling, up-selling.</p> <p>Learner closes calls in accordance with campaign procedures and, where information is to be supplied to the customer at a later stage, follow-up is prompt and in accordance with campaign procedures.</p>	<p>Observer feedback form has 'yes' ticked.</p> <p>Observer feedback form has 'yes' or N/A ticked for each.</p> <p>Observer feedback form has 'yes' ticked.</p>
Element 3	Two	<p>Learner records results according to campaign procedures and systems.</p> <p>Learner records and reports difficulties encountered according to campaign procedures.</p>	<p>Observer feedback form has 'yes' ticked.</p> <p>Observer feedback form has 'yes' ticked.</p>

Manager or Team Leader Verification Form

Name of Learner:		
Name of Verifier:		Phone:
Relationship to Learner:		

_____ is currently being assessed toward Unit Standard
16780 Respond to in-bound calls relating to marketing campaigns in a contact centre.

The learner must:

- prepare to respond to in-bound calls
- process in-bound calls
- record the results of in-bound calls relating to a marketing campaign.

Your signature below confirms that the learner has:

- identified, discussed and clarified with you the details of the campaign objectives, procedures and call guide
- identified and agreed with you the operational boundaries in dealing with customers
- completed their own work, and that it is within the requirements of your organisation.

Comments

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The assessor may contact you to discuss the learner's performance.

Signed: _____

Date: _____

Thank you for your assistance.

Observer Feedback Form

Name of Learner:	Learner's DOB:
Name of Observer:	Phone:
Relationship to Learner:	

_____ is currently being assessed toward Unit Standard
16780 Respond to in-bound calls relating to marketing campaigns in a contact centre.

Purpose of this form

Learners use this form to gain feedback to support their assessment for this unit standard. This form should be completed by an approved observer or assessor who has observed the learner in a situation where they had the opportunity to demonstrate their competence in the performance criteria for this unit standard.

Situation (please give brief details of the situation in which you observed the learner's performance):

In the situation you describe, do you believe the learner has met the requirements of each of the following performance criteria for this unit standard?

Performance criteria	The Learner has met the criteria
The learner greeted customers in accordance with campaign procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
The learner received customer details and requirements efficiently and politely in accordance with campaign procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
The learner processed enquiries and/or provided products and services in accordance with campaign procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Your responses to the following will depend on the nature of the campaign. They:	
<ul style="list-style-type: none"> conveyed information to the customer 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> discussed and agreed on payment options 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> recorded the order 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> discussed delivery details 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> forwarded the order to dispatch or delivery personnel 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> arranged credit checks 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> prepared credit card charges 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> referred inquiries beyond the scope of the CSR to appropriate personnel 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
<ul style="list-style-type: none"> completed lead generation, cross-selling and up-selling. 	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
The learner closed calls in accordance with campaign procedures and, where information was to be supplied to the customer at a later stage, follow-up was prompt and in accordance with campaign procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Recorded results according to campaign procedures and systems.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Recorded and reported difficulties encountered according to campaign procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>

Comments - You can use this section to elaborate on any special features of this activity, and to take notes for your own feedback to the learner. Continue on another sheet if necessary, and attach to this form. (Note: The assessor will discuss your comments with the learner, so only record comments you are comfortable sharing.)

Thank you for your assistance.

Signed: _____

Date: _____