

Learning Assessment Guide

Unit Standard 16781 – Version 4

Conduct out-bound telemarketing campaigns from a contact centre

Level 3 – 5 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 conduct out-bound telemarketing campaigns
- Conduct out-bound telemarketing campaigns
- Record results of out-bound telemarketing campaigns

This Learning Assessment Guide is made up of:

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

Special notes relating to this unit standard:

Definitions include:

- *Call Guide* – the script supplied to you by your organisation
- *Contacts* – the people you are calling during the campaign
- *Fulfilment* – follow-up sent to customers post call in the form of written material
- *Operational boundaries* – this is the bounds within which the CSR deals with the customer, and includes what freedom they have to deviate from the call guide

Further definitions are noted in the unit standard

Assessment Task One – Element 1

Introduction

The purpose of this task is to assess your ability to prepare to conduct out-bound telemarketing campaigns.

Instructions

Evidence of two campaigns is required. You may use either or both of the following scenarios for this assessment.

- a) Campaigns that are about to take place
- b) Campaigns that you have been involved in over the past 12 months

Campaigns must relate to marketing products or services, fundraising or basic research.

Complete the following tasks for each campaign.

For campaigns that are yet to take place...

Part A

- Research the campaign objectives, procedures and call guides. Note any questions you may have
- Identify the operational boundaries when dealing with contacts
- Identify the fulfilment processes, ensuring they are in line with the campaign agreement
- Give an explanation of the targets of the campaign

Put the above in writing and ask your team leader to check its accuracy during Part B

Part B

Meet with your team leader or manager to discuss the campaigns prior to their commencement. Your discussion must include:

- The campaign objectives, procedures and call guides, including clarification of any questions raised in Part A.
- Agreement as to the operational boundaries and fulfilment procedures.
- A Verification Form is included in this learner's guide. Please ask your manager or team leader to complete this and hand it to your assessor. Use one copy per campaign.

For campaigns that have already taken place...

- You must complete Part A retrospectively and ask your team leader to complete the Verification Form for Part B
- Give all documentation to your assessor, who may choose to ask you further questions

Assessment Task Two – Element 2

Introduction

The purpose of this task is to assess your ability to conduct out-bound telemarketing campaigns.

Instructions

For this task use the same campaigns that you provided evidence for in Task One.

You must provide evidence of having conducted two out-bound telemarketing campaigns, including making the calls and completing the fulfilment process.

For campaigns already completed, please ask your manager or team leader to complete the Task Two Observer checklist to confirm that you met the criteria when you conducted the campaign. Use a separate checklist per campaign.

For current campaigns, your assessor or someone approved by them will observe you conducting the campaign and complete the checklist, again a separate checklist per campaign. You will not be observed throughout the entire campaign; however your assessor will observe a number of calls to ensure consistency.

Provide your observer with copies of the campaign procedures and call guides if they do not have these already.

Your assessor may wish to discuss your work with you after the observation has taken place.

Assessment Task Three– Element 3

Introduction

The purpose of this task is to assess your ability to record the results of out-bound telemarketing campaigns.

Instructions

For the campaigns worked with in the previous tasks, you must provide your assessor with evidence of having recorded:

- the call outcomes
- any difficulties faced
- amendment of database contact details.

All must be in accordance with campaign procedures.

A Verification Form is provided for your manager, team leader or observer to complete. Please use one form per campaign.

Your assessor may wish to ask you questions if clarification or further evidence is required.

Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 16781.

Element	Task	Evidence required	Judgement
Element 1	Task 1	<ul style="list-style-type: none"> Copies of call guides, campaign objectives and procedures. Operational boundaries and fulfilment procedures as identified by the candidate. An explanation of campaign targets. Verification form signed by manager or team leader. Any written notes etc from pre-campaign meetings. 	<p><i>For two campaigns:</i></p> <p>Learner has researched the campaign objectives, procedures and call guides and has discussed and clarified same with their team leader/manager.</p> <p>Learner has correctly identified and gained agreement as to the operational boundaries and fulfilment processes.</p> <p>Learner correctly explains the targets in accordance with the objectives of the campaign.</p>
Element 2	Task 2	<p>Completed observer checklists.</p> <p>Campaign procedures and call guides.</p>	<p><i>For two campaigns:</i></p> <p>Learner identifies contacts from the database.</p> <p>Learner calls contacts and processes and records the calls within the scope of the call guides and operational boundaries.</p> <p>Learner promptly completes fulfilment and/or billing procedures.</p> <p>Learner deals with queries efficiently and politely. Where necessary queries beyond their scope are referred.</p> <p>All tasks are carried out in accordance with campaign procedures.</p>

Element	Task	Evidence required	Judgement
Element 3	Task 3	Completed Verification Form	<p><i>For two campaigns:</i></p> <p>Learner records call outcomes.</p> <p>Learner records difficulties encountered and amends database details where required.</p> <p>All tasks carried out in accordance with campaign procedures.</p>

Manager or Team Leader Verification Form**Task One**

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

_____ is currently being assessed toward Unit Standard
16781 Conduct out-bound telemarketing campaigns from a contact centre.

Your signature below confirms that the learner has satisfactorily discussed the following with you:

- Campaign objectives.
- Call guides.
- Operational boundaries correctly identified and agreed to.
- Fulfilment or follow-up procedures correctly identified and agreed to.

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**Task Two**

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

_____ is currently being assessed toward Unit Standard 16781 Conduct out-bound telemarketing campaigns from 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):

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In the situation you describe above, 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
Contacts identified from the database.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Contacts identified in line with campaign procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Calls are made, processed and recorded in line with the call guide, campaign procedures and operational procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner completes the follow-up and/or billing processes within the agreed timeframe and in line with procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner deals with queries efficiently and politely and in accordance with procedures.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner refers queries that are beyond their scope to the correct person if required.	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: _____

Manager or Team Leader Verification Form

Task Three

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

_____ is currently being assessed toward Unit Standard 16781 Conduct out-bound telemarketing campaigns from a contact centre.

Your signature below confirms that the learner has satisfactorily completed the following tasks:

- Recorded call outcomes.
- Recorded any difficulties they encountered.
- Made amendments to the database where required.

Comments

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

Signed: _____

Date: _____

Thank you for your assistance.