

Learning Assessment Guide

Unit Standard 16782 – Version 4

Conduct telephone surveys from 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 conduct telephone surveys from a contact centre.
- Conduct telephone surveys from a contact centre.
- Record data resulting from telephone surveys from a contact centre.

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 the CSR will use.
- *Calling strategies* – plan of communication. This is based on call history, the stage of the call cycle and the objectives of the campaign.
- *Operational boundaries* – the limits within which the CSR can deal with the contact.
- *Targets* – this may refer to the number or frequency of calls or calls to a specific sector of the audience.

A full list of definitions is available in the unit standard.

Types of surveys may include market research, customer surveys or opinion polls.

The nature of this unit standard requires that it be assessed in a workplace environment.

Assessment Task One – Element 1

Introduction

The purpose of this task is to prepare to conduct telephone surveys from a contact centre.

Instructions

Choose two surveys. These may be surveys that have taken place within the past 12 months and/or surveys about to take place.

- A. For each survey study the call guide, survey questions, possible objections, and call procedures and note any issues.
- B. Write an explanation of the targets of the campaign.
- C. Write an explanation of the call strategy.
- D. Select the people to be interviewed from the database.

Meet with your manager or team leader. Discuss Part A with them and clarify any of the issues you have raised. Ask them to check your explanations of the targets and the call strategy and confirm you have selected the correct people to be interviewed. For surveys that have taken place this will need to be retrospective.

Ask them to complete the Task One Verification Form confirming that the above has been performed to the organisation's standards. One Verification per survey should be completed.

Hand a copy of the call guide, questions, procedures and possible objections to your assessor, clearly identifying each one.

Also provide your assessor with your explanations of the targets and calling strategies, and the completed Verification Forms.

Your assessor may wish to ask further questions to clarify any points or gain further evidence.

Assessment Task Two – Element 2

Introduction

The purpose of this task is to assess your ability to conduct telephone surveys from a contact centre.

Instructions

For this task use the surveys worked with in Task One. You must provide evidence of successfully conducting the telephone surveys. This includes performing the following activities in accordance with the call guide and survey procedures.

- Opening and closing calls.
- Ascertaining the contacts availability and willingness to participate.
- Informing the contact of the details, purpose and approximate length of the survey.
- Putting the questions to the contact and recording their responses.

An observation checklist is included in this guide. One checklist per survey should be completed.

For surveys that have already taken place ask your team leader or manager to complete the observation form to verify you met the criteria.

For current surveys your assessor or an approved observer will observe you making several calls and complete the checklist.

Your assessor may want to discuss your work with you at the end of the task.

Assessment Task Three – Element 3

Introduction

The purpose of this task is to assess your ability to record data resulting from telephone surveys from a contact centre. Recording methods may be manual or on computer.

Instructions

For this task use the surveys worked with in Tasks One and Two.

Provide your assessor with a completed Task Three Verification Form (included in this guide), confirming that you have:

- Recorded outcomes in accordance with survey procedures.
- Recorded any difficulties encountered.
- Amended contact details where necessary.

Your team leader or observer can complete the form. One form per survey should be completed.

Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 16782.

Element	Task	Evidence required	Judgement
Element 1	Task 1	<p><i>For two surveys</i></p> <ul style="list-style-type: none"> • Call guides • Survey questions • Possible objections • Survey procedures • Explanation of targets and call strategies • Completed Verification forms 	<p><i>For two surveys</i></p> <p>Learner identifies the call guides; survey questions, possible objections and survey procedures, and discusses and clarifies same with their team leader.</p> <p>Learner gives correct explanations of the targets which are in line with the objectives of the survey.</p> <p>Learner correctly explains the calling strategy in line with survey procedures.</p> <p>Learner accesses the database and correctly determines the persons to be interviewed in line with survey procedures.</p>
Element 2	Task 2	<p><i>For two surveys</i></p> <ul style="list-style-type: none"> • Call guides • Survey questions and procedures • Completed observation checklists 	<p><i>For two surveys</i></p> <p>Learner is observed correctly performing the following tasks in accordance with the call guides and survey procedures.</p> <p>Opening and closing calls.</p> <p>Ascertaining the contact's availability and willingness to participate.</p> <p>Informing the contact of the survey details, its purpose and approximate length.</p> <p>Putting survey questions to the contact and recording their responses.</p>
Element 3	Task 3	<p><i>For two surveys</i></p> <ul style="list-style-type: none"> • Survey procedures 	<p><i>For two surveys</i></p> <p>Learner correctly records the</p>

Element	Task	Evidence required	Judgement
		<ul style="list-style-type: none"> Completed Verification Forms. 	<p>following either manually or on computer in accordance with survey procedures.</p> <ul style="list-style-type: none"> Call outcomes Difficulties encountered Database contact details amended where applicable.

Task One

Manager or Team Leader Verification Form

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

_____ is currently being assessed toward Unit Standard
16782 Conduct telephone surveys from a contact centre.

The learner must:

- Correctly identify, discuss and clarify the:
 - call guide
 - survey questions
 - possible objections
 - survey procedures
- Explain targets in relation to the survey objectives.
- Explain the call strategy in relation to the survey procedures.
- Access the database and determine the people to be interviewed.

Your signature below confirms that the above is the learner's 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.

Task Two

Observer Feedback Form

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

_____ is currently being assessed toward Unit Standard
16782 Conduct telephone surveys 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
Opened and closed calls.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Ascertained contact's availability and openness to participate.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Informed contacts of survey details, its purpose and approximate length.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Put questions to the contact and recorded responses.	Yes <input type="checkbox"/> No <input type="checkbox"/>
All tasks must be in accordance with the call guide and survey 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: _____

Task Three

Manager or Team Leader Verification Form

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

_____ is currently being assessed toward Unit Standard
16782 Conduct telephone surveys from a contact centre.

The learner must:

- Record outcomes
- Record difficulties encountered
- Update contact details where applicable

Your signature below confirms that the above is the learner's own work and that it is within the requirements of your organisation and within survey procedures.

Comments

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

Signed: _____

Date: _____

Thank you for your assistance.