

Learning Assessment Guide

Unit Standard 379 – Version 6

Sell goods and/or services over the telephone

Level 3 – 3 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 sell goods and/or services over the telephone
- greet customers over the telephone
- identify customer needs and expectations over the telephone
- sell goods and/or services to customers over the telephone.

This Learning Assessment Guide is made up of:

- Tasks for you to complete. These tasks are in the form of an observation checklist that the approved observer or assessor will use to record your performance.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

1 Definitions

Organisational procedures refer to instructions to staff on policy and procedures which are formally documented or generally accepted within the workplace.

Customer refers to both internal and external customers and refers to the recipient of goods and/or services.

- ### 2
- Performance of the elements of this unit standard must comply with the following legislation – Privacy Act, 1993; Consumer Guarantees Act, 1993; Fair Trading Act, 1986, Credit Contracts and Consumer Finance Act, 2003; Health and Safety in Employment Act, 1992; Human Rights Act, 1993; and their subsequent amendments.
- ### 3
- Evidence is required for four separate telephone sales.

Assessment Task One – Element 1

Introduction

Assessment task one is designed to assess your ability to prepare to sell goods and/or services over the telephone.

Instructions

- Your assessor will complete the attached observation checklist. If your assessor is not sure of your knowledge they may ask you to explain more.
- At least one example of the behaviour will be recorded for each criterion. Tasks 2-4 require four examples of each. Once the assessor has observed several examples of the required competency they will record the date of action and any relevant comments. If the competency is not displayed they will not record the date of action but add any relevant comments to support their judgement.
- You may need to answer relevant questions about organisational procedures and product to demonstrate your knowledge.
- Relevant organisational procedures and product information may be produced as evidence.
- Your assessor and you will decide in advance who your customers are – they may be either internal or external customers and will receive goods and/or services that you are selling.
- Remember that your answers must comply with the relevant legislation. This website can help you research the legislation: <http://www.legislation.govt.nz/sitemap.aspx>

Observation checklist

(For use by the assessor or an approved observer)

Prepare to sell goods and/or services over the telephone.

Action	Date of action	Comment
<p>The learner has demonstrated that they know all relevant organisational procedures for telephone selling. This refers to instructions to staff on policy and procedures which are formally documented or generally accepted within the workplace.</p> <p>Depending on the workplace this may include such things as:</p> <ul style="list-style-type: none"> • objectives • greeting • data collection • access to customer details • questioning • listening • reference material • goods and/or services offered • sales process • customer service • referral • positive attitude • recording • confirmation • closing. 		
<p>The learner demonstrates accurate and up-to-date product knowledge.</p>		
<p>Assessor name:</p>	<p>Assessor signature:</p>	

The completed assessment for task one will include:

The learner can answer relevant questions about organisational procedures and product to demonstrate their knowledge. Relevant organisational procedures and product information may be produced as evidence. The 'date of action' column is completed for each task with any relevant comments made. The assessor has named and signed the checklist.

Assessment Task Two – Element 2

Introduction

Assessment task two is designed to assess your ability to greet customers over the telephone.

Instructions

- Your assessor will complete the attached observation checklist. If your assessor is not sure of your skills they may ask you to demonstrate or explain more.
- You must provide evidence for four separate telephone sales.
- You may need to answer relevant questions about organisational procedures to demonstrate your knowledge.
- Relevant organisational procedures may be produced as evidence.
- Your assessor and you will decide in advance who your customers are – they may be either internal or external customers and will receive goods and/or services that you are selling.
- Remember that your behaviour must comply with the relevant legislation. This website can help you research the legislation: <http://www.legislation.govt.nz/sitemap.aspx>

Greet customers over the telephone.

Action	Date of action	Comment
<p>The learner greets customers in accordance with organisational procedures.</p> <p>Depending on the workplace this may include such things as:</p> <ul style="list-style-type: none"> • giving a standard greeting • following a script • having an appropriate tone of voice • demonstrating courtesy • using the correct name • observing timeliness. 	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>The learner obtains customers' permission to pursue the selling situation and unwilling customers are farewelled in accordance with organisational procedures.</p>	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>Assessor name:</p>	<p>Assessor signature:</p>	

The completed assessment for task two will include:

The 'date of action' column is completed four times for each task with any relevant comments made. The assessor has named and signed the checklist.

Assessment Task Three – Element 3

Introduction

Assessment task three is designed to assess your ability to identify customer needs and expectations over the telephone.

Instructions

- Your assessor will complete the attached observation checklist. If your assessor is not sure of your skills they may ask you to demonstrate or explain more.
- You must provide evidence for four separate telephone sales.
- You may need to answer relevant questions about organisational procedures to demonstrate your knowledge.
- Relevant organisational procedures may be produced as evidence.
- Your assessor and you will decide in advance who your customers are – they may be either internal or external customers and will receive goods and/or services that you are selling.
- Remember that your behaviour must comply with the relevant legislation. This website can help you research the legislation: <http://www.legislation.govt.nz/sitemap.aspx>

Identify customer needs and expectations over the telephone.

Action	Date of action	Comment
<p>The learner identifies and assists customers with special needs in accordance with organisational procedures.</p> <p>Depending on the situation this may include adapting to the needs of people with:</p> <ul style="list-style-type: none"> • hearing impairment • speech impediment • physical disability • English as a second language. 	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>The learner uses active listening skills to identify customer needs and expectations in accordance with organisational procedures.</p> <p>Depending on the situation this may include:</p> <ul style="list-style-type: none"> • demonstrating full attention • using open and closed questions • recognising tone of voice • matching • clarifying • reflecting • paraphrasing • summarising • measuring motivation. 	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>The learner confirms the needs and expectations with customers in accordance with organisational procedures.</p> <p>This must include:</p> <ul style="list-style-type: none"> • providing accurate information • covering all the areas the customer needs and expects • observing timeliness. 	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>Assessor name:</p>	<p>Assessor signature:</p>	

The completed assessment for task three will include:

The 'date of action' column is completed four times for each task with any relevant comments made. The assessor has named and signed the checklist.

Assessment Task Four – Element 4

Introduction

Assessment task four is designed to assess your ability to sell goods and/or services to customers over the telephone.

Instructions

- Your assessor will complete the attached observation checklist. If your assessor is not sure of your skills they may ask you to demonstrate or explain more.
- You must provide evidence for four separate telephone sales.
- You may need to answer relevant questions about organisational procedures to demonstrate your knowledge.
- Relevant organisational procedures may be produced as evidence.
- Your assessor and you will decide in advance who your customers are – they may be either internal or external customers and will receive goods and/or services that you are selling.
- Remember that your behaviour must comply with the relevant legislation. This website can help you research the legislation: <http://www.legislation.govt.nz/sitemap.aspx>

Sell goods and/or services to customers over the telephone.

Action	Date of action	Comment
<p>The learner describes goods and/or services and identifies their features and benefits.</p>	<p>1. 2. 3. 4.</p>	
<p>The learner identifies options for meeting customer needs and expectations in accordance with organisational procedures.</p>	<p>1. 2. 3. 4.</p>	
<p>The learner overcomes objections in accordance with organisational procedures.</p> <p>Depending on the situation this may include:</p> <ul style="list-style-type: none"> • listening for clues • asking questions • acknowledging objections • suggesting additional benefits • sidetracking. 	<p>1. 2. 3. 4.</p>	
<p>The learner demonstrates a closing strategy in accordance with organisational procedures.</p> <p>Depending on the situation this may include:</p> <ul style="list-style-type: none"> • direct close • trial close • alternative close • summary close • checking of records • ensuring maximum customer benefit. 	<p>1. 2. 3. 4.</p>	

<p>The learner offers add-ons in accordance with organisational procedures.</p>	<ol style="list-style-type: none"> 1. 2. 3. 4. 	
<p>The learner refers to appropriate providers customers whose needs they are unable to meet in accordance with organisational procedures.</p>	<ol style="list-style-type: none"> 1. 2. 3. 4. 	
<p>The learner complies with legislative requirements.</p>	<ol style="list-style-type: none"> 1. 2. 3. 4. 	
<p>The learner accurately processes documentation in accordance with organisational procedures.</p> <p>Depending on the workplace this may include:</p> <ul style="list-style-type: none"> • sales order • payment details • delivery details • order number • timeframes • updating customer records • filing • storage. 	<ol style="list-style-type: none"> 1. 2. 3. 4. 	

<p>The learner closes the call in accordance with organisational procedures.</p> <p>Depending on the workplace this may include:</p> <ul style="list-style-type: none"> • a suitable farewell statement • using the customers' names • inviting them to use goods and/or services again • thanking them for their patronage • having a positive attitude. 	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>The learner completes follow-up in accordance with organisational procedures.</p> <p>Depending on the workplace this may include:</p> <ul style="list-style-type: none"> • processing the sale • ensuring delivery • checking customer satisfaction • offering other goods and/or services • providing feedback • seeking and recording feedback • checking progress • modifying procedures. 	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>	
<p>Assessor name:</p>	<p>Assessor signature:</p>	

The completed assessment for task four will include:

The 'date of action' column is completed four times for each task with any relevant comments made. The assessor has named and signed the checklist.

Assessment Guide

These are the evidence and judgements that your assessor will use to assess your competence in unit standard 379.

Task / Element	Evidence required	Judgement
<p><i>Task 1 / Element 1</i> (PC 1.1 – 1.2)</p> <p>Prepare to sell goods and/or services over the telephone.</p>	<p>The assessor completes the 'date of action' column against each criterion with any relevant comments, then names and signs the checklist.</p> <p>Knowledge of organisational procedures for telephone selling is demonstrated.</p> <p>Product knowledge is demonstrated.</p>	<p>Knowledge is consistent with the range and accurate according to instructions to staff on policy and procedures which are formally documented or generally accepted within the workplace.</p> <p>Knowledge is accurate and up-to-date.</p>
<p><i>Task 2 / Element 2</i> (PC 2.1 – 2.2)</p> <p>Greet customers over the telephone.</p>	<p>The assessor completes the 'date of action' column against each criterion with any relevant comments, then names and signs the checklist.</p> <p>Customers are greeted.</p> <p>Customer's permission to pursue the selling situation is obtained and unwilling customers are farewelled.</p>	<p>Four customers are greeted appropriately, in accordance with organisational procedures and consistent with the range.</p> <p>Four customers' permission is obtained or the customer is appropriately farewelled in accordance with organisational procedures.</p>

Task / Element	Evidence required	Judgement
<p><i>Task 3 / Element 3</i> (PC 3.1 – 3.3)</p> <p>Identify customer needs and expectations over the telephone.</p>	<p>The assessor completes the 'date of action' column against each criterion with any relevant comments, then names and signs the checklist.</p> <p>Customers with special needs are identified and accommodated</p> <p>Active listening skills are used to identify customer needs and expectations. Customer needs and expectations are identified.</p> <p>Needs and expectations are confirmed with customers.</p>	<p>Of the four customers, any customers with special needs are identified and adapted to in accordance with organisational procedures. If these four customers do not have special needs, the learner can explain what accommodation they may make based on previous experience.</p> <p>Skills are demonstrated on four occasions, are consistent with the range and in accordance with organisational procedures.</p> <p>Four customers' needs and expectations that cover the range are confirmed in accordance with organisational procedures.</p>
<p><i>Task 4 / Element 4</i> (PC 4.1 – 4.10)</p> <p>Sell goods and/or services to customers over the telephone.</p>	<p>The assessor completes the 'date of action' column against each criterion with any relevant comments, then names and signs the checklist.</p> <p>Goods and/or services are described to identify their features and benefits.</p> <p>Options for meeting customer needs and expectations are identified.</p>	<p>Description is accurate.</p> <p>Options are identified for four customers in accordance with organisational procedures.</p>

Task / Element	Evidence required	Judgement
	<p>Objections are overcome.</p> <p>Closing strategy is demonstrated.</p> <p>Add-ons are offered.</p> <p>Customer needs unable to be met are referred to appropriate providers.</p> <p>Legislative requirements are complied with.</p> <p>Documentation is completed accurately and processed.</p> <p>Call is closed.</p> <p>Follow-up is completed.</p>	<p>Any objections from the four customers are overcome consistently within the range and in accordance with organisational procedures.</p> <p>Closing strategy is demonstrated for four customers, consistent within the range and in accordance with organisational procedures.</p> <p>Add-ons offered to four customers as appropriate are in accordance with organisational procedures.</p> <p>Customer needs unable to be met are referred to appropriate providers in accordance with organisational procedures.</p> <p>All behaviours are compliant with the legislation.</p> <p>Documentation consistent with the range is completed accurately and processed for four customers in accordance with organisational procedures.</p> <p>Call is closed consistent with the range for four customers in accordance with organisational procedures.</p> <p>Follow-up is completed for four customers consistent with the range and in accordance with organisational procedures.</p>