

Learning Assessment Guide

Unit Standard 57 – Version 5

Provide customer service in given situations

Level 2 – 2 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:

- Identify elements of good service in a given situation.
- Provide customer service in a given situation.
- Respond to customer complaints in a given situation.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Observation form
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

- 1 In this unit standard *enterprise requirements* refer to documented instructions about policy and procedures (including service level agreements and the application of legislation to enterprise situations). These instructions are available in the workplace, work site and/or training or educational establishment. Enterprise requirements may include but are not limited to - health and safety requirements, service delivery requirements, special needs requirements, customer complaints requirements.
- 2 In this unit standard *a given situation* refers to service situations that reflect real workplaces.
- 3 Definitions
enterprise refers to any workplace, work site and/or training or educational establishment;
customer refers to both internal and external customers and refers to the recipient of goods and/or services;
service chain refers to all the parts that make up the service delivery process. The parts may include but are

not limited to - client, front-line customer service interaction, back-up staff, supplier, manufacturer, and distributor activities;

customer care refers to all the activities that are required to provide customer satisfaction;

positive customer attitude refers to a genuine concern to assist customers, empathy, and a “can do” approach to meeting customer needs;

customer service refers to any action taken to meet customer needs and expectations in relation to provision of services;

active listening refers to the skills of listening. These skills may include but are not limited to - questioning, reading and responding to body language, use of silence, paraphrasing, reflecting feelings, summarising.

- 4 Legislative requirements may include but are not limited to - Privacy Act, 1993; Health and Safety in Employment Act, 1992; Human Rights Act, 1993; and subsequent amendments.
- 5 The following unit standard may be considered relevant to, and/or supportive of this unit standard, but is not a prerequisite entry unit standard: Unit 62, *Maintain personal presentation in the workplace*.

Assessment Task One – Element 1

Assessment task one is designed to assess your ability to:

Identify elements of good service in a given situation.

Elements may include but are not limited to – service chain, customer care, communication, personal and interpersonal factors.

Introduction

For this assessment task you will be required to:

- Answer questions
- Complete the tables
- Complete the activity tasks
- Use the organisation’s policy and procedure document

Instructions

You may choose to write your responses or provide oral answers to this task. In the event that you choose to provide oral answers to task one, your assessor will record and hold your responses as evidence.

You must complete all tasks.

Questions

1. What does the term “customer care” mean?

2. What does the term “customer service” mean?

3. Name three communication skills that you use for customer service in your organisation

They must be in accordance with organisational requirements.

1.

2.

3.

Table 1

Complete the following table by giving a brief description of each of the following roles that make up the service delivery process.

Part of service chain	Describe what part they play in the service delivery process in your organisation
Client	
Front – line customer	
Service staff	
Back – up staff	
Suppliers	
Manufacturers	
Distributers	
Other	

Table 2

Complete the following table by giving a brief description of the significance of the customer and good customer service concepts. Describe them as they apply within your organisation.

Significance of:	Description in accordance with organisation’s requirements
Profit	
Customer satisfaction	
Reputation	
Customer loyalty	
Customer feedback	

Activity 1

Photocopy the relevant sections of your organisation's documents which list standards relating to personal presentation, and highlight those relating to the following five personal presentation and grooming standards. If these standards are not documented, record them as you understand them to be.

- Body cleanliness
- Clothing cleanliness
- Hair care
- Makeup
- Clothes maintenance

You will need to give a copy of this work to your assessor.

Activity 2

Using your organisation's documented requirements highlight policies and procedures related to the following service delivery factors.

Highlight these in a different colour to that used in Activity 1.

- Positive customer attitude
- Motivation
- Interest
- Responsiveness

As with the previous activity, if these are not clearly recorded in organisation policy and procedure documents, record them as you understand them to be.

You will need to give a copy of this work to your assessor.

Assessment Task Two – Element 2

Assessment task two is designed to assess your ability to:

Provide customer service in a given situation.

Introduction

This is an observation which must be completed by your Manager or assessor.

Instructions

You will need to arrange for your Manager or assessor to observe you for this unit standard. They will observe you on **two** different occasions.

Providing customer service

The Manager/assessor will be observing the following:

- That you greet customers with a smile, polite language, appropriate welcoming phrase, and promptness.
- That you identify the customer's service needs by: questioning, clarifying or summarising.
- That you are able to maintain the customer's service level even when you are dealing with several demands at one time.
- That you provide the customer with information that is: accurate, appropriate service knowledge coverage and timeliness.
- That the services you provide match the customer's needs.
- That you meet the customer's requirements
- That when you don't know how to meet the customer's requirements you refer them to a more knowledgeable staff member.
- That you treat people with special needs appropriately.
- That you are aware of customer security and provide that security in accordance with organisational requirements.

You will need to meet organisation requirements on all 9 performance criteria. If this does not happen during the two observations, additional observation will be required.

Assessment Task Three – Element 3

Assessment task three is designed to assess your ability to:

Respond to customer complaints in a given situation.

Introduction

This is an observation which must be completed by your Manager or assessor.

Instructions

You will need to arrange for your Manager or assessor to observe you for this task. They will need to observe you dealing with at least one customer complaint. As it is unlikely that a complaint will occur during an arranged observation period, this could be telephone follow up of a written complaint, or a meeting arranged for this purpose.

Responding to complaints

The Manager/assessor will be observing the following:

- That you identify customer complaints and take prompt action in accordance with organisational requirements.
- That you demonstrate procedures that minimise disruption in accordance with organisational requirements.
- That you recognise those complaints that need to be referred to a more experienced staff member and these are acted on promptly and in accordance with organisational requirements.
- That you take remedial action where necessary in accordance with organisational requirements.

You will need to meet organisation requirements on all 4 performance criteria. If this does not happen during the observation organised, additional observation will be required.

Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 57.

Element	Task	Evidence required	Judgement	
Identify elements of good service in a given situation.	Task one	Answer questions.	Answers conform to the model answers.	Yes/No
		Complete the two tables.	Two completed tables are provided.	Yes/No
		Highlight the organisation's policy and procedure document to show: <ul style="list-style-type: none"> • Personal presentation and grooming standards • Standards relating to positive customer attitude and responsiveness Or if these are not documented record these standards as you understand them to be.	Appropriate sections are highlighted. Or standards are recorded as they are understood to be.	Yes/No
Provide customer service in a given situation.	Task two	Observation form must be completed and signed.	Completed and signed observation form is provided.	Yes/No
		All performance criteria must be ticked for YES.	All performance criteria are ticked for YES.	Yes/No
Respond to customer complaints in a given situation.	Task three	Observation form must be completed and signed.	Completed and signed observation form is provided.	Yes/No
		All performance criteria must be ticked for YES.	All performance criteria are ticked for YES.	Yes/No

Observation Form

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

_____ is currently being assessed toward Unit Standard
57 Provide customer service in given situations.

Purpose of this form

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

Occasions (please give brief details of the two occasions on which you observed the learner's performance):

1.
2.

On the situations you described above, do you believe the learner has met the organisation's requirements for each of the following performance criteria for this unit standard?

Performance criteria	The Learner has met the criteria
Applies customer care, and customer service that is accordance with the organisations requirements.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Greets customer with: smile, polite language, appropriate welcoming phrase, promptness.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Identified the customers needs by:	Yes <input type="checkbox"/> No <input type="checkbox"/>

questioning, clarifying, summarising.	
Was able to maintain customer service level when dealing with several demands at a time.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Provided customer with information: accurately, service knowledge coverage, timeliness.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Services provided matched the customer's needs.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Where necessary the customer request was referred to a more experienced staff member.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Customers with special needs were dealt with in an appropriate manner.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner is aware of customer security and provides security to enterprise requirements	Yes <input type="checkbox"/> No <input type="checkbox"/>
Identifies customer complaints and take prompt action.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Demonstrates procedures that minimise disruption.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Recognises those complaints that need to be referred to a more experienced staff member and these are acted on promptly.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Takes remedial action where necessary.	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: _____