

# Learning Assessment Guide

## Unit Standard 7455 – Version 3

### *Develop and strengthen customer relationships and services*

### Level 6 – 10 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:

- Develop, implement and review customer service standards
- Monitor and review customer services against standards
- Build customer relationships.

This Learning Assessment Guide is made up of:

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

Special notes relating to this unit standard:

1. Organisation refers to the business entity and can cover a variety of types and forms of organisation, whether profit or non-profit, in private, public, or voluntary sectors, including business units, iwi, and other special purpose bodies.
2. Customer is the generic description for a person or organisation who receives products or services supplied by the organisation. Customers may be external or internal to the organisation. The term 'customer' may be translated according to the user's context as 'client', 'consumer', 'member', 'patient', or other title.
3. Customer requirements is the expression of features of products, services, production, and delivery processes, including both essential features or needs (both stated and implied), and desirable features.
4. Quality is the totality of the characteristics of products and services that bear on their ability to satisfy stated and implied needs of customers and other stakeholders.
5. Stakeholders are individuals and groups, which have some direct interest in the organisation and its products or services. Stakeholders typically include customers, providers, owners, shareholders, managers, employees, employee organisations, and regulatory bodies.
6. This unit standard will be assessed on the basis of evidence of demonstrated performance in the workplace. This calls for a variety of assessment modes and forms of evidence. Evidence must show consistency of performance across a range of situations and demonstrate knowledge, understanding and skill in the principles and practices directly relating to the competent performance of elements and performance criteria.

## Assessment Task One – Element 1

### Introduction

You will be demonstrating that you have developed customer service standards. You may have already completed part, or all, of this task and only need to produce evidence for verification and answer the questions. If so, work your way through the questions, forms and tasks to see what evidence you need to provide for verification.

If you have not completed any of these tasks, answer the questions, and then ask an assessor to complete the verification form. You also need your manager or team leader to complete the Manager or Team Leader Verification form and an assessor to complete the assessor verification form.

Assessment task one is designed to assess your ability to:

- Identify customer requirements through consultation and market research.
- Identify customer requirements in terms of the organisation's strategic direction and market stance.
- Develop customer service standards.
- Allocate and train staff, and organise work routines.
- Demonstrate that consistent customer service is provided across the organisation.
- Review standards at defined intervals and document changes.

### Instructions

- Answer all the questions to complete the assessment.
- Ask an approved assessor to complete the assessor verification form
- Ask your manager or team leader to complete the verification form.













## Assessment Task Two – Elements 2 and 3

### Introduction

You will be demonstrating that you can monitor and review customer services against standards, and build customer relationships. You may have already completed part, or all, of this task and only need to produce evidence for verification and answer the questions. If so, work your way through the questions, forms and tasks to see what evidence you need to provide for verification. Evidence may include reporting data from Team Leaders, performance data and statistics, survey reports, staff training information and expenditure, etc. You also need your Manager or Team Leader to complete the Verification Form, and an assessor to complete the assessor verification form.

Assessment task two is designed to assess your ability to:

- Monitor and review customer services against standards by:
  - Establishing methods for monitoring and reviewing the quality of customer transactions, products and services.
  - Taking account of changing customer requirements and the organisation's market position and competition.
  - Identifying potential customer service problems or constraints.
  - Checking that customer complaints are being handled promptly and in accordance with set standards.
  - Ensuring that opportunities for customers to provide feedback on customer service are communicated.
  - Monitoring and reviewing customer feedback and reaction.
  
- Build customer relationships so that:
  - An effective rapport with the customer is established and maintained.
  - Customers are contacted at agreed intervals to determine whether new or additional products and services are required and to offer special or additional benefits.
  - After sales services provide opportunities for strengthening customer relationships and continuing customer satisfaction.
  - Customer service is provided by all staff in a manner which promotes goodwill and trust, and takes account of special needs with sensitivity, empathy and respect.
  - Policies, procedures and activities designed to promote customer trust, satisfaction and goodwill are actioned promptly, accurately and willingly by all staff.

## **Instructions**

- Answer all the questions to complete the assessment.
- Ask an approved assessor to complete the assessor verification form
- Ask your manager or team leader to complete the verification form.
- Provide supporting documentary evidence.









## Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 7455.

| Element  | Task | Evidence   | Judgement  |                                      |
|--|------|--|--|--------------------------------------|
| 1. Develop, implement and review customer service standards. | 1    | Questions 1 – 5 are answered in full.<br>Appropriate documentation provided.     | Answers are consistent with the model answers.<br>Evidence and answers demonstrate the learner's involvement in the development, implementation and review of service standards. | Yes / No<br><br>Yes / No<br>Yes / No |
|  |      | Supporting workplace evidence is provided.                                       |  |                                      |
|  |      | Assessor verification form is completed.   | Form is completed and signed. Comments are supportive.   | Yes / No<br>Yes / No                 |
|  |      | Manager or Team Leader Verification Form is completed.                           | Form is completed and signed. Comments are supportive.   | Yes / No                             |
| 2. Monitor and review customer services against standards.   | 2    | Questions 1 – 4 are answered in full.<br>Appropriate documentation provided.     | Answers are consistent with the model answers.   | Yes / No                             |
|  |      | Assessor verification form is completed.   | Form is completed and signed.<br>Comments are supportive.  | Yes / No<br>Yes / No                 |
|  |      | Manager or Team Leader Verification Form is completed.                           | Form is completed and signed. Comments are supportive.   | Yes / No<br>Yes / No                 |
|  |      | Supportive workplace documentary evidence is provided.                           | Evidence and answers demonstrate the learner's leadership in the monitoring and review of customer services against standards.   | Yes / No                             |
| 3. Build customer relationships.                             | 3    | Questions 5 – 7 are all answered in full.<br>Appropriate documentation provided. | Answers are consistent with the model answers.   | Yes / No                             |
|  |      |  | Form is completed and signed.  | Yes / No                             |

|  |  |   |  |                 |
|--|--|---|--|-----------------|
|  |  | <p>Assessor verification form is completed.</p> <p>Supportive workplace documentary evidence is provided.</p> | <p>Comments are supportive.</p> <p>Evidence and answers demonstrate the learner's leadership in building customer relationships.</p> | <p>Yes / No</p> |
|--|--|---|--|-----------------|

## Assessor Verification Form

|                          |  |             |
|--------------------------|--|-------------|
| <b>Name of Learner:</b>  |  | <b>DOB:</b> |
| <b>Name of Assessor:</b> |  |             |

\_\_\_\_\_ is currently being assessed toward Unit Standard 7455 - Develop and strengthen customer relationships and services.

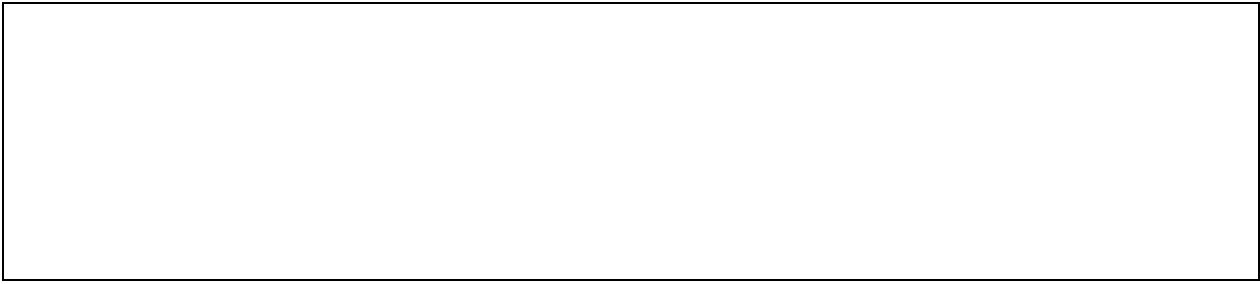
The learner must set up and manage systems that:

- Identify the customers' requirements. They must consult with customers and key informants and use market research or other information collection techniques.
- Identify customer requirements in terms of the organisation's strategic direction and market stance. This includes but is not limited to:
  - organisational policy on the level of service
  - current service objectives and comparison with competitor strategies and actions
  - customer market segmentation and organisation's 'target' customers.
- Develop customer service standards to satisfy identified customer requirements and fully communicate them to all staff in a manner which secures their commitment and support. They must know and understand the organisation's definition of quality service and how it is implemented and monitored.
- Establish methods for monitoring and reviewing the quality of customer transactions, products and services against the required customer service standards.
- Demonstrate that the systems used to review customer service standards take account of changing customer requirements and the organisation's market position and competition.
- Monitor and review customer feedback and reaction at agreed intervals for conformance with desired outcomes so that weaknesses, gaps and opportunities for improvement are identified.
- Demonstrate that after sales services provide opportunities for strengthening customer relationships and continuing customer satisfaction. Range: after sales services – includes but is not limited to technical assistance, product support, quality assurance, guarantees, repair or replacement policies.

Your signature below confirms that the explanations, market research, and customer service standards are the learner's own work, and that it is within the requirements of the organisation.

Comments

|  |
|--|
|  |
|--|



You may wish to contact the learner's manager or verifier to further discuss the learner's performance.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

### Manager or Team Leader Verification Form

|                                 |  |               |
|---------------------------------|--|---------------|
| <b>Name of Learner:</b>         |  |               |
| <b>Name of Verifier:</b>        |  | <b>Phone:</b> |
| <b>Relationship to Learner:</b> |  |               |

\_\_\_\_\_ is currently being assessed toward Unit Standard 7455 - Develop and strengthen customer relationships and services.

The learner must:

- Be involved in the development, implementation and review of customer service standards which:
  - Have been developed to satisfy identified customer requirements.
  - Have been fully communicated to all staff in a manner which secures their commitment and support.
  - Demonstrate consistent customer service has been provided across the organisation.
  - Have been reviewed at defined intervals in order to meet emerging requirements, and changes to the standards have been documented.
  - With staff allocated and trained, and work routines organised for effective service delivery to meet customer requirements.
- Systems have been established which:
  - Allow for the identification of potential customer service problems or constraints in time for action to be taken which ensures continued customer satisfaction.
  - Ensure that complaints are handled expeditiously in accordance with the customer service standards.
  - Ensure that the customer has been informed promptly and politely of the outcome of complaints and proposed remedial action.
  - Ensure that opportunities for customers to provide feedback on customer service have been clearly communicated to them.
- Promote the building of customer relationships so that:
  - An effective rapport has been established and maintained with the customer in all subsequent dealings to foster long-term relationships and continuing business.
  - Customers are contacted at agreed intervals to determine whether new or additional products and services are required and to offer special or additional benefits.

- Customer service is provided by all staff in a manner which promotes goodwill and trust, and takes account of special needs with sensitivity, empathy and respect.
- Policies, procedures and activities are designed to promote customer trust, satisfaction and goodwill and are actioned promptly, accurately and willingly by all staff.

Your signature below confirms that the documents supplied for verification are the learner's own work, and that it is within the requirements of your organisation.

Comments

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

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you for your assistance.