

# Learning Assessment Guide

## Unit Standard 8074

*Establish, develop and improve quality focused aspects of customer relationships*

Version 5 Level 4, Credits 8



### Learner to complete

Name:

Employer:

NSN or DOB:

### Assessor to complete

Meets requirements

Further evidence required

Name:

Signed:

Date:





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## INTRODUCTION

This Learning Assessment Guide will help you complete assessment for unit standard:

- 8074, Establish, develop and improve quality-focused aspects of customer relationships

You can also refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).

Before assessment, you will need to:

- meet with your assessor
- complete a pre-assessment form

When you have finished assessment you will need to sign a form that declares the work is yours.

A checklist at the end of this assessment lists everything you need to do before you give your assessment to your assessor.

**Important.** The Learning State Assessment Handbook has more information on the Learning State assessment process and completing assessments. Download this from our website or contact your Training Advisor.

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Kia Kaha and Good Luck

## LEARNING STATE PRE-ASSESSMENT FORM

Consider the following to find out if you are ready for this assessment:

- I understand the instructions for each task Yes / No
- I have the things I need to complete each task Yes / No
- I have the knowledge to complete each theory task Yes / No
- I have the skills to complete each practical task Yes / No
- I can produce the evidence listed for each task Yes / No

The people who will be involved in this assessment include:

Verifier(s) \_\_\_\_\_ Phone: \_\_\_\_\_

\_\_\_\_\_ Phone: \_\_\_\_\_

Other \_\_\_\_\_

Role: \_\_\_\_\_ Phone: \_\_\_\_\_

### Assessor sign off

I am satisfied the people listed above have the required skills, knowledge and experience to provide verification.

Assessor \_\_\_\_\_

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

### Declaration of understanding

I confirm that I understand the evidence I am required to collect and produce.

Name: \_\_\_\_\_

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



## EXPLANATORY NOTES

1. Quality is the degree to which a set of inherent characteristics of products and services fulfils the stated and implied requirements of customers and other stakeholders.
2. Definitions

*Customers* are people or organisations who receive products or services. They can be external or internal to the supplier.

*Customer requirements* are needs or expectations (in relation to products, services and production, and delivery processes) that are either stated, generally implied, or obligatory.

*Suppliers* include both internal and external suppliers of products and services.
3. All activities must comply with: any policies, procedures, business protocols, and requirements of the organisation(s) involved; the ethical codes of relevant professional bodies; and any relevant legislative and/or regulatory requirements.
4. Legislation relevant to this unit standard can include but is not limited to: Health and Safety in Employment Act 1992, Resource Management Act 1991, Official Information Act 1982, Privacy Act 1993, State Sector Act 1988, Employment Relations Act 2000, Fair Trading Act 1986, Consumer Guarantees Act 1993, and subsequent amendments.
5. Assessment evidence for this unit standard must be collected from practical workplace experience related to quality improvement, and must include evidence of candidate's underpinning knowledge and understanding of the organisation's business processes and methods.

## TASK 1

### Outcome

This task is designed to show your assessor you can:

- establish quality-focused relationships with customers
- develop, maintain, and improve quality-focused relationships with new or existing customers
- evaluate own performance as a supplier.

### Evidence required

Evidence	Sources
<ul style="list-style-type: none"><li>■ Two case studies</li><li>■ Any relevant supporting documents as evidence (such as supply agreements, service level agreements, customer surveys etc.)</li><li>■ A description of how the case studies and supporting documents demonstrate your ability to establish, develop and improve quality focused aspects of customer relationships.</li><li>■ A completed verification form.</li></ul>	<ul style="list-style-type: none"><li>■ This Learning Assessment Guide</li><li>■ The workplace</li></ul>



## Instructions

You are required to:

1. provide **two case studies** that demonstrate how you:
  - establish a quality-focused relationship with two internal or external customers (may be one of each)
  - develop, maintain, and improve a quality-focused relationship with new or existing internal or external customers
  - evaluate your own performance as a supplier.
2. You must show that you have followed all the same processes with the same internal or external customer. The case studies must also demonstrate your knowledge and understanding of your organisation's business processes and methods.
3. Refer to the following checklist to ensure that your case studies cover the points listed.

## Checklist

Establish quality focused relationships with customers	Requirements met
Analysis of organisation's internal and/or external supply processes and work flow establishes potential customer – supplier relationships.	Yes/No
Customer requirements are clarified in sufficient detail to enable them to be converted into specific criteria. These include stated and implied requirements and can be matched with the supplier's capability to supply those requirements.	Yes/No
Negotiations are carried out to ensure that both parties will benefit from the customer-supplier relationship.	Yes/No
Supply agreements are documented to meet both parties' requirements, and contain all the information required to establish and maintain a mutually beneficial relationship. Information includes requirements for evaluation of supplier performance and key performance indicators. This information may include but is not limited to:	Yes/No

<ul style="list-style-type: none"> <li>■ after sales service</li> <li>■ guarantees</li> <li>■ changes to supply agreements</li> <li>■ payment terms</li> <li>■ quality criteria and/or quantity criteria</li> <li>■ delivery criteria</li> <li>■ requirements for review of the relationship.</li> </ul>	
<p><b>Develop, maintain and improve quality-focused relationships with new or existing customers</b></p>	<p><b>Requirements met</b></p>
<p>Activities involving the mutual exchange of resources are managed and developed to reinforce supply agreements and develop long term commitment.</p> <p>Activities may include but are not limited to:</p> <ul style="list-style-type: none"> <li>■ complaint handling</li> <li>■ audits</li> <li>■ site visits</li> <li>■ meetings</li> <li>■ improvement projects.</li> </ul> <p>Resources may include but are not limited to:</p> <ul style="list-style-type: none"> <li>■ information</li> <li>■ personnel</li> <li>■ technology</li> </ul>	<p>Yes/No</p>
<p>Methods used for acquiring customer feedback provide information in a form that can be used to improve customer relationships.</p> <p>Methods may include but are not limited to:</p> <ul style="list-style-type: none"> <li>■ customer surveys</li> <li>■ complaints handling</li> <li>■ customer focus groups</li> <li>■ mutual visits between the organisation and customers.</li> </ul>	<p>Yes/No</p>
<p>Supply agreements and relationships with customers are reviewed in order to meet emerging requirements and develop relationships.</p>	<p>Yes/No</p>
<p>Any changes to the relationship are documented to meet the requirements of both parties.</p>	<p>Yes/No</p>



<b>Evaluate own performance as a supplier</b>	<b>Requirements met</b>
<p>Evaluation of own performance as a supplier is carried out in accordance with the requirements of the supply agreement, using a method suited to the situation.</p> <p>Methods may include but are not limited to:</p> <ul style="list-style-type: none"><li>■ informally asking the customer</li><li>■ debrief meetings</li><li>■ benchmarking</li><li>■ surveys</li><li>■ customer satisfaction measures.</li></ul>	Yes/No
<p>Any actions taken to improve supplier performance are taken on the basis of customer feedback and as a result of the evaluation.</p>	Yes/No
<b>Assessor name and signature:</b>	

## TASK 2

### Outcome

This task is designed to show your assessor you can:

- establish quality-focused relationships with customers
- develop, maintain, and improve quality-focused relationships with new or existing customers
- evaluate own performance as a supplier.

### Evidence required

Evidence	Sources
<ul style="list-style-type: none"><li>■ relevant supporting documents as evidence (such as supply agreements, service level agreements, customer surveys etc.)</li><li>■ A completed verification form.</li></ul>	<ul style="list-style-type: none"><li>■ This Learning Assessment Guide</li><li>■ The workplace</li></ul>

### Instructions

You are required to:

1. Give any documentation prepared for the previous task to your manager or team leader.
2. List the documents in the verification form and ask your manager or team leader to complete it (if more room is required please write on a separate piece of paper and attach to this guide).
3. Once the verification form has been completed pass it on to your assessor.



## VERIFICATION FORM

Name of Learner:	
Name of Verifier	Phone
Position of Verifier	Date verified

\_\_\_\_\_ is currently being assessed against Unit Standard 8077, Participate in a team to achieve specified quality improvement objectives. They are required to:

- establish quality-focused relationships with customers
- develop, maintain, and improve quality-focused relationships with new or existing customers
- evaluate own performance as a supplier.

Documentation provided:

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In addition to ticking 'yes' or 'no' to the statements in the checklist that follows, please provide examples and/or comments that will assist the assessor to make a confident decision.

Verification checklist	Yes/No	
■ I have read the case studies provided by the learner to assessment task one.		
■ I can verify that this work has been completed by the learner.		
■ The descriptions the learner has provided are accurate and are in accordance with this organisation's requirements.		
■ I have sighted any documentation prepared for task one and two.		
■ The records were produced by the learner as part of their actual work.		

Verification checklist	Yes/No	
<ul style="list-style-type: none"><li>■ The records were created in accordance with organisational requirements (for example, policies and procedures have been correctly followed).</li></ul>		

Your signature confirms:

- that the learner met your requirements and those of the organisation.
- That you have received a copy of Learning State's Guide for Workplace Verifiers.

Verifier's Signature \_\_\_\_\_

***Thank you for your assistance.***

**Assessor confirmation of verifier**

Has the verifier the suitable level of expertise in the performance being verified? YES / NO (please circle one)



## ASSESSMENT SUMMARY CHECKLIST

Use the following checklist to check that you have completed everything you need to do before you give your assessment to your assessor.

<b>I have completed/produced the following:</b>	✓
Pre-assessment form	
Task 1: <ul style="list-style-type: none"><li>■ two case studies</li><li>■ any relevant supporting documents as evidence (such as supply agreements, service level agreements, customer surveys etc.)</li><li>■ a description of how the case studies and supporting documents demonstrate my ability to establish, develop and improve quality focused aspects of customer relationships</li><li>■ a completed verification form</li></ul>	
Task 2: <ul style="list-style-type: none"><li>■ any relevant supporting documents as evidence (such as supply agreements, service level agreements, customer surveys etc)</li><li>■ a completed verification form</li></ul>	
Declaration of authenticity	

## DECLARATION OF AUTHENTICITY

I confirm that I have completed assessment for Unit Standard 8074 v5  
on my own and the evidence produced is my own work.

Name: \_\_\_\_\_

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



## ASSESSMENT SCHEDULE

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

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Use the following evidence and judgement statements to determine if you have Met Requirements (MR) or Not Yet Met Requirements (NYMR)

Outcome	Task	Evidence	Judgement	MR/NYMR
<p>Establish quality-focused relationships with customers</p> <p>Develop, maintain, and improve quality-focused relationships with new or existing suppliers</p> <p>Evaluate own performance as a supplier.</p>	1 & 2	<p>Two case studies and associated descriptions have been provided.</p> <p>Verification form has been completed.</p>	<p>Two case studies and associated descriptions demonstrate the ability to:</p> <ul style="list-style-type: none"> <li>■ establish quality-focused relationships with customers</li> <li>■ develop, maintain, and improve quality-focused relationships with new or existing customers</li> <li>■ evaluate own performance as a supplier.</li> </ul> <p>Verification form verifies that the documentation provided for the two case studies meets organisation requirements.</p>	

**Assessment result:**

The learner has:

***Met requirements***      ***Further Evidence Required***      (please circle)

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

If further evidence is required, please provide details of next action:

## Notes

