**Module 3: Dealing with Customers FSA Workplace Assessment**

**NQF 2 Contact Centre Support ID 71490 LP 73269**

|  |  |
| --- | --- |
| **Name:**  |  |
| **ID Number:**  |  |
| **Workplace:**  |  |
| **Region:**  |  |
| **Date:**  |  |
| **Signature (to verify this is my own work)**  |  |

# Marking Grid: (For Office Use ONLY)

|  |  |  |
| --- | --- | --- |
| **SECTION**  | **TOTAL**  | **Learner Achievement**  |
| **Activity 1**  |  |  |
| **Activity 2**  |  |  |

|  |  |
| --- | --- |
| **Marked By:**  |  |
| **Date:**  |  |
| **Competent**  | **Not Yet Competent**  |
| **Assessor Sign off:**  |  |
| **Notes:**  |  |
|  |  |
|  |  |
|  |  |
|  |  |

## FSA WORKPLACE ACTIVITY 1 : WORKPLACE EVIDENCE

As part of this module, you are required to provide practical evidence that you are able to provide quality customer service. As part of this (you will be asked to provide call observation evidence), you also need to demonstrate your understanding of your workplace’s policies and procedures

The following checklist will help guide you as to what you need to collect/present as supporting evidence to your call observations (Final Summative Assessment).

Documentation Checklist:

|  |  |  |  |
| --- | --- | --- | --- |
| **Documentation Requirement**  | **Reference/ included in my POE (yes/ no)**  | **Explanation of why it is or not needed**  | **Sign off by Workplace coach as having seen & learner explaining each (sign & date)**  |
| 1. Company Greeting  |   |   |   |
| 2. Customer Service Level Agreements (process flows)  |   |   |   |
| 3. Company specific timeframes  |   |   |   |
| 4. Product Information  |   |   |   |
| 5. Escalation Procedure  |   |   |   |
| 6. Description of technology system used  |   |   |   |
| 7. Security & Confidentiality agreements  |   |   |   |
| 8. Responses & Scripts (for electives)  |   |   |   |
| 9. Practices & Procedures (where relating to such calls)  |   |   |   |

Please make sure you **include/explain the evidence** you collected above to ensure that the assessor understands the calls, policies and procedures of your workplace!

You must make sure your coach verifies and checks that this evidence is relevant, current and is an accurate reflection of the standards and processes in your workplace.

## FSA WORKPLACE ACTIVITY 2: CALL OBSERVATIONS

Observation is used by the assessor / supervisor to observe a learner carrying out a particular activity as a normal part of his/her workplace responsibilities. This method is particularly suited to evaluating process as well as practical skills. All the observations must be with real customers / clients – simulation is not allowed for any performance evidence within this activity.

**Instructions to the Learner:**

Your supervisor will observe you as you perform the listed tasks in this observation. You must correctly do all the tasks listed (assessment criteria) on the sign-off sheets that follow. When carrying out this action, all related organisational policies and procedures must be followed at all times.

**INSTRUCTIONS to the COACH:**

1. **Your coach must assess you at least once every two weeks (or more frequently) using the observation sheets attached.**
2. **The checklists can be printed out or copied for each assessment you need.**
3. **For each call observed, your coach must complete:**

a. **Call Observation Sheet** (relates to the whole call in terms of policies, procedures, customer service, communication etc. You would’ve completed and included this evidence in your formative assessment activities)

1. **Each call can be supported by your workplace documentation –make sure you and your coach signs this off.**
2. **It is preferable that these calls be recorded and/or referenced to be included in your portfolio of evidence. If all calls in your contact centre are recorded, make sure that these observed calls are referenced so it can be retrieved/saved to disc for including in your portfolio of evidence.**

|  |  |  |
| --- | --- | --- |
| **Call OBSERVATION Evidence Sheet** |  |  |
| **Learner Name**  |  |  |  |
| **Learner Signature**  |  |  |  |
| **Workplace Coach** (who Observed the call): |  |  |  |
| **Workplace Coach Signature**  |  |  |  |
| **Details of Observation** (Date; time; reference number of call)  |  |  |  |
| **Unit Standards being assessed:** [Integrated Assessment]  | **10348; 13885;** **13873**  | **NQF Level**  | **2**  |

**NOTES to the Coach:**

 These observations are carried out by either listening to live calls and/or taped calls and in some instances checking emails, system, correspondence, and Internet transactions. Learners should be encouraged to attach such evidence to this sheet and file in the portfolio evidence.

 You must observe at least once a week or a total of 7 calls.

 The assessment criteria listed below may or may not occur during the observation (therefore you have to observe regularly so that all the criteria can be observed at one time or another).

 You are required to mark C where the learner demonstrates the skill CORRECTLY, NYC where learners have not complied to all requirements.

 You are also required to put detailed comments to support your C and NYC decisions. This will be evidence to the assessor looking at the criteria and your motivation of your decision. If there are no such supporting comments, an assessor cannot be fully informed and will result in the learner being declared NYC.

 If a judgement cannot be made because the criteria has not occurred during several assessments, then a simulation exercise may be carried out. However, simulation is only encouraged as the last resort. Mind-the-Gap will co-ordinate this for your environment – i.e.

over and above your observations, we will also conduct a simulated assessment. Attach any written notes to the assessment sheet

 Please ensure that feedback is given to the learner after the observation and that the areas for development tie into the current coaching sessions you have with them.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
|  | **Company Greeting**  |  |  |  |  |
|   | Call is answered according to company specific greeting  |   |   |   |   |
|  | **Language**  |  |  |  |  |
|   | Calls and customers are responded to in the appropriate language or medium  |   |   |   |   |
|  | **Identifying customers needs**  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
| 10348 (SO1AC1) 13885 (SO1AC1)  | Customers’ needs are correctly identified by using appropriate questioning and listening techniques  |   |   |   |   |
| 10348 (SO1AC2) 13885 (SO1AC2)  | A correct understanding of customers’ needs in demonstrated by applying industry specific responses  |   |   |   |   |
| 10348 (SO1AC3) 13885 (SO1AC3)  | Customers’ needs are identified within company specific timeframes  |   |   |   |   |
| 10348 (SO1AC4)  | Company specific prompts and procedures are consistently followed  |   |   |   |   |
|  | **Responding to customer needs and/ or requests and/ or queries**  |  |  |  |  |
| 10348 (SO2AC1) 13885 (SO2AC1)   | Customer needs, requests, queries are responded to accurately by choosing the correct action to company specific requirements Product specific and relevant information is accurately matched to the customers’ needs The customer’s requests are understood  |   |   |   |   |
| 10348 (SO2AC2)   | Customers are responded to in accordance with company specific time limits and Service Level Agreements and company specific procedures  |   |   |   |   |
| 10348 (SO2AC3)  | Responses comply with comply with service defined responses and scripts  |   |   |   |   |
| 10348 (SO2AC4)  | Accuracy is confirmed by the customer in the interaction  |   |   |   |   |
| 10348 (All)  | Queries are responded to accurately (Range: Accurately defines the correct choice of action to be taken)  |   |   |   |   |
|  | **Offering Information to Customers**  |  |  |  |  |
| 13885 (SO1AC1)  | Product specific and relevant information is accurately matched to the customer’s needs  |   |   |   |   |
| 13885 (SO2AC2)   | Information is consistent and logical and is presented with clarity Information provided is current and up to date Relevant information is provided on an outbound call  |   |   |   |   |
| 13885 (SO2AC4)  | Information is offered within company specific timeframes  |   |   |   |   |
| 13885 (SO2AC3)   | Customer specific relevant information is provided  |   |   |   |   |
| 13885 (SO2AC6)  | Sufficient options and alternatives are offered in order to effect a solution  |   |   |   |   |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
| EEK (13885) EEK (10348)  | Relevant information is provided to customer by giving correct information about product or service offered as well as industry requirements  |   |   |   |   |
|  | **Escalation situations**  |  |  |  |  |
| 13885 (SO2AC5)   | Escalation situations are identified and company specific procedures are correctly followed Customers are informed of escalation situations and follow-ups are passed on to relevant parties Timeframes are adhered to  |   |   |   |   |
|   | **Communication Skills**  |   |   |   |   |
| EEK (13885) EEK (10348)  | Learner demonstrates understanding through the appropriate application of: * methods and techniques for

listening * questioning techniques
* customer service principles
* identifying and solving problem
 |   |   |   |   |
|   | **Contact Centre Principles**  |   |   |   |   |
| EEK (10348)  EEK (13873)  | Learner demonstrates understanding through the appropriate application of: • Telephone techniques * Contact centre guidelines, policies and procedures
* Company complaint procedure
* Escalation procedure
* methods and techniques of providing practical business solutions
 |   |   |   |   |
|  | **Resolving Problems (Handling Complaints)**  |  |  |  |  |
| 13873 (SO1 AC1 & AC2)  | The nature of the complaint is identified and assessed and the origin correctly identified.  |   |   |   |   |
| 13873 (SO1 AC3 SO2AC1)  | Learner takes responsibility for action to solve the problem is taken and shows commitment to solve it   |   |   |   |   |
| 13873 (SO1 AC4)  | The problem is correctly documented according to company regulations and requirements  |   |   |   |   |
| 13873 (SO2AC2 & AC3)  | The customer is totally satisfied with the complaint process to date and provides support where necessary  |   |   |   |   |
| 13783 (SO3 AC1 & AC3)  | Correct solution is applied to solve the customer’s complaint within the agreed timeframe  |   |   |   |   |
| 13783 (SO4 AC2)  | Relevant internal parties are notified of the complaint and its rooting  |   |   |   |   |
| 13783 (SO4 AC3)  | The customer is communicated with regarding the outcome and progress of the solutions  |   |   |   |   |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
| 13783 (SO5 AC2)  | Relationships are built by solving the customer’s complaint timeously and according to company procedures and by building sales  |   |   |   |   |
|  | **Follow up Process**  |  |  |  |  |
| 13873 (SO43AC2)  | Contact regarding the complaint is maintained with all relevant stakeholders  |   |   |   |   |
| 13783 (SO5 AC1)  | A partnership is arranged between other stakeholders and the organization, which enhances the solution of the customer’s problem  |   |   |   |   |
| 13873 (SO4 AC1)  | Relevant internal parties are notified of the complaint and its rooting  |   |   |   |   |
|  | **Closing the call**  |  |  |  |  |
|   | Call is closed in accordance with the context of the call within a Contact Centre  |   |   |   |   |
|   | Call wrap up procedures are correctly applied  |   |   |   |   |

|  |  |
| --- | --- |
| **Date of feedback**  |  |
| **Areas to Develop:**  |  |
| **Areas of Strength:**  |  |
| **Learner Signature (in receipt of this feedback):**  |  |
| **Workplace Coach Signature:**  |  |

|  |  |  |
| --- | --- | --- |
| **Call OBSERVATION Evidence Sheet** |  |  |
| **Learner Name**  |  |  |  |
| **Learner Signature**  |  |  |  |
| **Workplace Coach** (who Observed the call): |  |  |  |
| **Workplace Coach Signature**  |  |  |  |
| **Details of Observation** (Date; time; reference number of call)  |  |  |  |
| **Unit Standards being assessed:** [Integrated Assessment]  | **10348; 13885;** **13873**  | **NQF Level**  | **2**  |

**NOTES to the Coach:**

 These observations are carried out by either listening to live calls and/or taped calls and in some instances checking emails, system, correspondence, and Internet transactions. Learners should be encouraged to attach such evidence to this sheet and file in the portfolio evidence.

 You must observe at least once a week or a total of 7 calls.

 The assessment criteria listed below may or may not occur during the observation (therefore you have to observe regularly so that all the criteria can be observed at one time or another).

 You are required to mark C where the learner demonstrates the skill CORRECTLY, NYC where learners have not complied to all requirements.

 You are also required to put detailed comments to support your C and NYC decisions. This will be evidence to the assessor looking at the criteria and your motivation of your decision. If there are no such supporting comments, an assessor cannot be fully informed and will result in the learner being declared NYC.

 If a judgement cannot be made because the criteria has not occurred during several assessments, then a simulation exercise may be carried out. However, simulation is only encouraged as the last resort. Mind-the-Gap will co-ordinate this for your environment – i.e.

over and above your observations, we will also conduct a simulated assessment. Attach any written notes to the assessment sheet

 Please ensure that feedback is given to the learner after the observation and that the areas for development tie into the current coaching sessions you have with them.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
|  | **Company Greeting**  |  |  |  |  |
|   | Call is answered according to company specific greeting  |   |   |   |   |
|  | **Language**  |  |  |  |  |
|   | Calls and customers are responded to in the appropriate language or medium  |   |   |   |   |
|  | **Identifying customers needs**  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
| 10348 (SO1AC1) 13885 (SO1AC1)  | Customers’ needs are correctly identified by using appropriate questioning and listening techniques  |   |   |   |   |
| 10348 (SO1AC2) 13885 (SO1AC2)  | A correct understanding of customers’ needs in demonstrated by applying industry specific responses  |   |   |   |   |
| 10348 (SO1AC3) 13885 (SO1AC3)  | Customers’ needs are identified within company specific timeframes  |   |   |   |   |
| 10348 (SO1AC4)  | Company specific prompts and procedures are consistently followed  |   |   |   |   |
|  | **Responding to customer needs and/ or requests and/ or queries**  |  |  |  |  |
| 10348 (SO2AC1) 13885 (SO2AC1)   | Customer needs, requests, queries are responded to accurately by choosing the correct action to company specific requirements Product specific and relevant information is accurately matched to the customers’ needs The customer’s requests are understood  |   |   |   |   |
| 10348 (SO2AC2)   | Customers are responded to in accordance with company specific time limits and Service Level Agreements and company specific procedures  |   |   |   |   |
| 10348 (SO2AC3)  | Responses comply with comply with service defined responses and scripts  |   |   |   |   |
| 10348 (SO2AC4)  | Accuracy is confirmed by the customer in the interaction  |   |   |   |   |
| 10348 (All)  | Queries are responded to accurately (Range: Accurately defines the correct choice of action to be taken)  |   |   |   |   |
|  | **Offering Information to Customers**  |  |  |  |  |
| 13885 (SO1AC1)  | Product specific and relevant information is accurately matched to the customer’s needs  |   |   |   |   |
| 13885 (SO2AC2)   | Information is consistent and logical and is presented with clarity Information provided is current and up to date Relevant information is provided on an outbound call  |   |   |   |   |
| 13885 (SO2AC4)  | Information is offered within company specific timeframes  |   |   |   |   |
| 13885 (SO2AC3)   | Customer specific relevant information is provided  |   |   |   |   |
| 13885 (SO2AC6)  | Sufficient options and alternatives are offered in order to effect a solution  |   |   |   |   |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
| EEK (13885) EEK (10348)  | Relevant information is provided to customer by giving correct information about product or service offered as well as industry requirements  |   |   |   |   |
|  | **Escalation situations**  |  |  |  |  |
| 13885 (SO2AC5)   | Escalation situations are identified and company specific procedures are correctly followed Customers are informed of escalation situations and follow-ups are passed on to relevant parties Timeframes are adhered to  |   |   |   |   |
|   | **Communication Skills**  |   |   |   |   |
| EEK (13885) EEK (10348)  | Learner demonstrates understanding through the appropriate application of: * methods and techniques for

listening * questioning techniques
* customer service principles
* identifying and solving problem
 |   |   |   |   |
|   | **Contact Centre Principles**  |   |   |   |   |
| EEK (10348)  EEK (13873)  | Learner demonstrates understanding through the appropriate application of: • Telephone techniques * Contact centre guidelines, policies and procedures
* Company complaint procedure
* Escalation procedure
* methods and techniques of providing practical business solutions
 |   |   |   |   |
|  | **Resolving Problems (Handling Complaints)**  |  |  |  |  |
| 13873 (SO1 AC1 & AC2)  | The nature of the complaint is identified and assessed and the origin correctly identified.  |   |   |   |   |
| 13873 (SO1 AC3 SO2AC1)  | Learner takes responsibility for action to solve the problem is taken and shows commitment to solve it   |   |   |   |   |
| 13873 (SO1 AC4)  | The problem is correctly documented according to company regulations and requirements  |   |   |   |   |
| 13873 (SO2AC2 & AC3)  | The customer is totally satisfied with the complaint process to date and provides support where necessary  |   |   |   |   |
| 13783 (SO3 AC1 & AC3)  | Correct solution is applied to solve the customer’s complaint within the agreed timeframe  |   |   |   |   |
| 13783 (SO4 AC2)  | Relevant internal parties are notified of the complaint and its rooting  |   |   |   |   |
| 13783 (SO4 AC3)  | The customer is communicated with regarding the outcome and progress of the solutions  |   |   |   |   |
| **Unit Std** **Link**  | **Assessment Criteria**  | **C**  | **NYC**  | **Not** **Observed**  | **Comments**  |
| 13783 (SO5 AC2)  | Relationships are built by solving the customer’s complaint timeously and according to company procedures and by building sales  |   |   |   |   |
|  | **Follow up Process**  |  |  |  |  |
| 13873 (SO43AC2)  | Contact regarding the complaint is maintained with all relevant stakeholders  |   |   |   |   |
| 13783 (SO5 AC1)  | A partnership is arranged between other stakeholders and the organization, which enhances the solution of the customer’s problem  |   |   |   |   |
| 13873 (SO4 AC1)  | Relevant internal parties are notified of the complaint and its rooting  |   |   |   |   |
|  | **Closing the call**  |  |  |  |  |
|   | Call is closed in accordance with the context of the call within a Contact Centre  |   |   |   |   |
|   | Call wrap up procedures are correctly applied  |   |   |   |   |

|  |  |
| --- | --- |
| **Date of feedback**  |  |
| **Areas to Develop:**  |  |
| **Areas of Strength:**  |  |
| **Learner Signature (in receipt of this feedback):**  |  |
| **Workplace Coach Signature:**  |  |