**FORMATIVE ASSESSMENT PACK: US 10350 & US 13886**

**Evidence Checklist:**

The following unit standards have been identified and aligned to this training (please refer to your evidence matrix and Portfolio of Evidence for more information):

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| **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Evidence** **Provided/** **Referenced**  | **Learner Notes/ Comments**  | **Assessment** **Decision** **C/NYC**  |
| 10350  | **Collect and record information queries and requests from customers**  | SO 1: Elicit information from customers  | 1. Information elicited is accurate and specific in accordance with customer's requirements
2. Information is elicited within company specific timeframes
 | NQF 2 (8)  |   |   |   |
| SO2: Offer information to others  | 1. Information is consistent and logical and is presented with clarity
2. Information complies with company specific requirements and formats
3. Information is offered within company specific timeframes
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| **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Evidence** **Provided/** **Referenced**  | **Learner Notes/ Comments**  | **Assessment** **Decision** **C/NYC**  |
|   |   | SO3: Record information from customers  | 1. Information is repeated to customer to ensure information has been accurately recorded
2. Information is recorded within company specific timeframes
3. Information recorded is relevant and consistent with company specific formats and requirements

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|    |   | SO4: Refer escalating requirements  | 1. Escalation situations are correctly identified
2. Escalations are conducted correctly according to company specific procedures and guidelines
3. Customers are informed of the escalation of their specific requirements and timeframes within which this will occur
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| Assessor Sign Off:  |   | Learner Sign Off & Date (Feedback):  |   |
| Date:  |   | Coach Sign Off & Date:  |   |
| Decision  |   | Moderator Sign Off & Date:  |   |

Comments/Notes:

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| 13886  | **Gather and provide relevant information** **to contribute to contact centre problem solving**  | SO 1: Obtain and evaluate project information to facilitate Contact Centre problem solving  | 1. Valid and reliable methods and sources for obtaining project information are identified and agreed with relevant parties
2. The co-operation of relevant parties in obtaining information is enlisted
3. Available information from relevant parties is identified, obtained and evaluated in conjunction with higher authority
4. Information gathered is analysed to identify potential improvements
 | NQF 3 (5)  |   |   |   |
| SO2: Provide advice and support regarding received information to facilitate problem solving  | 1. Advice and support are provided at appropriate times and only when necessary
2. The methods of providing advice are sensitive to the personal needs and positions of the relevant individuals
3. Advice and support are provided only so far as is necessary to allow progress to be maintained and to enable individuals and groups to work autonomously
4. Threats to the Contact Centre's success are identified at an early stage

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| Assessor Sign Off:  |   | Learner Sign Off & Date (Feedback):  |   |
| Date:  |   | Coach Sign Off & Date:  |   |
| Decision  |   | Moderator Sign Off & Date:  |   |

Comments/Notes:

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**Activity 1:**

You are required (on your own or in your work groups) to complete the following activities:

1.1 Draw up a summary sheet/poster for your workspace on the key communication skills to apply/remember when:

* Eliciting/obtaining information from customers
* Offering information to customers about your product/service or their query
* Recording information from customers on a system
* Referring escalation requirements where you are not in a position to help the customer

Remember to be creative and ensure that it is handy to be able to refer to when you are taking or making calls to customers.

**Activity 2:**

Having read the case study in your learner guide and gaining an understanding for CRM, answer the following questions in your work groups:

* 1. What are the strengths / opportunities with a CRM programme / system?

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* 1. What are some of the challenges in a CRM system?

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* 1. Looking at your own company, what is the philosophy with regards to CRM? Expand on this in terms of strengths and challenges.

**Activity 3:**

* 1. With reference to solving problem techniques, summarise the positive or negative effects brainstorming may find in your workplace.

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* 1. Research another problem solving technique not covered in your workbook and explain how you would apply it in your workplace and or group situation.

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