**10358 & 13883 FORMATIVE ASSESSMENT PACK**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ ID Number: \_\_\_\_\_\_\_\_\_\_\_\_ Group: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**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**  |
| 10358  | **Apply inbound Contact** **Centre Operations within a**  | SO 1: Retrieve calls from customers  | 1. Calls are retrieved timeously according to company specific timeframe requirements
2. Calls are retrieved using company specified technology and systems accurately and effectively
3. Calls are retrieved according to company specific procedures and methodologies
 | NQF 2 (8)  |   |   |   |
| **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Evidence** **Provided/** **Referenced**  | **Learner Notes/ Comments**  | **Assessment** **Decision** **C/NYC**  |
|  | **commercial environment**  | SO2: Input subject information from customers in accordance with specific Contact Centre requirements  | 1. The correct information for inputting purposes is identified

 1. Information is inputted accurately according to company standards
2. Information is recorded and inputted within company specific timeframes.
3. Information captured is relevant according to the customers' requirements
4. Information captured is consistent with company specific formats and requirements

 1. Information is verified according to company standard practices

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|   |   | SO3: Respond to queries from customers  | 1. Queries are responded to accurately. Range: Accurately defines the correct choice of action to be taken
2. Customers are responded to timeously according to company specific timeframes
3. Responses comply with company defined responses and

scripts 1. Relevant information is provided
 |   |   |   |   |
|   |   | SO4: Provide follow up to customers requests  | 1. Follow up procedures are conducted consistently
2. Follow up procedures are consistent with customer requirements
3. Follow-ups are conducted timeously according to company specific timeframes
4. Customers are informed of escalation situations and follow ups are passed onto relevant parties
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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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|  **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Content Mapping**  | **Assessment** **Activities**  | **FSA**  |
| 13883  | **Apply outbound Contact Centre Operations within a commercial environment**  | SO 1: Place calls to customers  | 1. Calls are placed to the correct customers as defined in work place instructions or worksheets
2. Calls are made utilising company specific technology or systems effectively
3. Relevant, accurate information is provided to customers
4. Calls are conducted and closed within company specific timeframes
 | NQF 3 (8)  |   |   |   |

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| **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Content Mapping**  | **Assessment** **Activities**  | **FSA**  |
|  |  | SO2: Record information from customers  | 1. The correct information for inputting purposes is identified
2. Information is inputted accurately
3. Information is recorded and inputted within company specific timeframes.
4. Information captured is relevant according to the customers' requirements
5. Information captured is consistent with company specific formats and requirements
6. Information is verified according to company standard practices
 |  |   |   |   |
|   |   | SO3: Respond to queries from customers  | 1. 2.  | Customers are responded to timeously according to company specific timeframes Responses comply with company-defined responses and scripts  |   |   |   |   |
|  |  |  | 3.  | Relevant information is provided  |  |  |  |  |
|  |  |  | 4.  | Queries are responded to accurately (Range: Accurately defines the correct choice of action to be taken)  |  |  |  |  |
|   |   | SO4: Handle a sales transaction telephonically  | 1. Sales transactions are concluded within company specific timeframes
2. Sales transactions are concluded wherein the sale is confirmed where appropriate to do so
3. Sales transaction discourse follows Contact centre specific scripting or response .requirements
4. Sales transactions are concluded accurately
5. The sales transaction is consistent with the customer's requirements
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| **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Content Mapping**  | **Assessment** **Activities**  | **FSA**  |
|   |   | SO5: Provide follow up to customers' requests  | 1. Follow up procedures are conducted consistently
2. Follow up procedures are consistent with customer requirements
3. Follow-ups are conducted timeously according to company specific timeframes
4. Customers are informed of escalation situations and follow-ups are passed on to relevant parties
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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:**

Answer the following questions/activities:

1.1 Do you think product knowledge is an important aspect for a contact centre agent to apply when responding to potential and existing customers? Give a reason for your answer.

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1.2 What risks exist for a company if information given from a customer during a call to the Contact Centre is inputted inaccurately?

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1.3 Name three benefits that following up to customers have for an organisation?

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1.4 Explain, in your words, what you understand by a customer’s “moment of truth” and how it applies to your work as a Contact Centre agent in taking and making calls to customers.

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1.5 The following activity relates to your work and performance. Remember your Dealing with Customers and Performance Standards Assessment Packs? We looked at evidence of you taking and making calls as well as operating computer systems and packages. This directly relates to your performance. You will need to collect evidence of your performance over a two month period so that you can prove your ability to:

* Retrieve calls from customers
* Input subject information from customers in accordance with specific Contact Centre requirements
* Respond to queries from customers
* Provide follow up to customers’ requests
* Place calls to customers
* Record information from customers
* Responding to queries from customers
* Handle a sales telephone call (where appropriate)
* Provide follow up to customers' requests

By including and analyzing such evidence you are able to demonstrate the competencies above. Please ensure that enough evidence of calls is collected to support your customer service and telephone techniques ability/skills.

# **Performance Statistics & Company Analysis Worksheet**

Obtain at least two months’ statistical data from your workplace of calls that you have made/taken in that period. You are required to:

1. Describe the spreadsheet by explaining what each statistic/column means (make sure your assessor understands what the sheet is telling us). By doing this you are able to explain your company specific requirements in responding to or taking calls.
2. Support this with any other relevant evidence you see necessary to demonstrate to processes you apply in applying in/outbound operations within a Contact Centre

Use the following table as guide to complete the following:

1. List your monthly target for each month.
2. Identify what your performance in each month was.
3. Explain your over/under performance for each month – provide reasons.
4. Get your worksheet signed off by your team leader.
5. Sign your evidence.

|  |  |
| --- | --- |
| **Month 1**  | **Month 2**  |
| Target:   | Target:  |
| What I achieved:    | What I achieved:  |
| Reasons for Under/Over Performance:           | Reasons for Under/Over Performance:     |
| Signed off (Team Leader): Date:   | Signed off (Team Leader): Date:  |

Signature of learner – this is my own work:

Workplace coach signature to verify workplace data, explanations and performance are valid and learner’s work:

**Activity 2:**

1. Answer the following **knowledge questions**:

* 1. Discuss and explain the Sales Cycle.

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* 1. List the six steps to selling.

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1. Complete the following **group activities**:

* 1. Divide yourselves into groups and brainstorm/write down where you might find prospective clients within your working environment.

List ALL the possibilities you can think of. Opportunities present themselves in the strangest of places. Appoint a spokesperson to provide feedback to the rest of the group.

Your facilitator will lead a discussion with the whole group and write all the ideas on a flipchart.

Make sure that you document the outcome of the discussion and include your notes in your portfolio of evidence

1. Complete the following **practical learning**:

* 1. Consider the following scenario and answer the questions that follow:

You’ve just started an Airport Shuttle Service business. You’ve been asked to meet with a potential corporate customer that would like to hear more about your services. You have a dedicated contact centre that can manage reservations and communicate with the drivers.

Your meeting has been confirmed for Wednesday, 14h00 and it will be with Mr Nkosi who is the Procurement Manager for Stocks Construction.

* + 1. Describe your product/service and include what the features, benefits and advantages of the product/service. For your reference:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Features are:**  |  | **Advantages are:**  |  | **Benefits are:**  |
| * Price
* Size
* Packaging
* What does the product consist of or made of
* Specific characteristics
 | • • • • • • •  | What does it mean How can it be used What does it do? How does it work? Design Efficiency Discounts  | • • • • • •  | Convenience Usefulness Value Pleasure Pride How will it improve lifestyle  |
|  |  |   | •  | Comfort and style  |
|  |  |  | •  | Time and money saving  |

* + 1. Based on the scenario above, prepare an introduction for your meeting.

* + 1. List three possible objections that Mr Nkosi might raise in the meeting and think of what you can say to overcome the objection

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| Objection  | Solution  |
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* 1. Complete the following role play and answer/demonstrate evidence for the questions that follow. Using the product/service that you sell in your contact centre conduct a role play that covers the following:

Note – where you are not in a workplace, make sure you make one up and document all your assumptions/thoughts around your scenario to be role played.

* + 1. Provide a scenario – explain what you are selling and key details about the

call

* + 1. Identifies the client type and needs

* + 1. Identify the sales opportunities presented in the conversation with your

client

* + 1. Identify your industry and organizational standards and procedures related to the call and sale

* + 1. How you will provide information to your client and ensure that it is accurate

* + 1. Close the sale - The sale is confirmed and authorized according to company specific procedures

# Worksheet 1: Planning Notes

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# Worksheet 2: Conducting the Role Play

**Role Played:**

**Notes and records made from the interaction:**

# Worksheet 3: Sales Call Role Play Evaluation

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| *Name (Role):*  |  |

 **Poor**  **Excellent**

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| Greeting was professional, friendly, audible and relevant  | 1 2 3 4 5  |
| The agent acknowledged the objection or effectively identified the customer’s needs  | 1 2 3 4 5  |
| The benefit/solution offered by the agent suited the customer’s needs  | 1 2 3 4 5  |
| The agent used effective listening & questioning techniques  | 1 2 3 4 5  |
| Positive, professional language was used  | 1 2 3 4 5  |
| The customer accepted the solution made by the agent (had problem solved)  | 1 2 3 4 5  |
| Overall I would score the agent’s handling of the call as…  | 1 2 3 4 5  |

Comments for Feedback:

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**Observed by (Facilitator/Assessor Name):**

**Date:**

**Result:**

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| --- | --- |
| *Name (Role):*  |  |

 **Poor**  **Excellent**

|  |  |
| --- | --- |
| Greeting was professional, friendly, audible and relevant  | 1 2 3 4 5  |
| The agent acknowledged the objection or effectively identified the customer’s needs  | 1 2 3 4 5  |
| The benefit/solution offered by the agent suited the customer’s needs  | 1 2 3 4 5  |
| The agent used effective listening & questioning techniques  | 1 2 3 4 5  |
| Positive, professional language was used  | 1 2 3 4 5  |
| The customer accepted the solution made by the agent (had problem solved)  | 1 2 3 4 5  |
| Overall I would score the agent’s handling of the call as…  | 1 2 3 4 5  |

Comments for Feedback:

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**Observed by (Facilitator/Assessor Name):**

**Date:**

**Result:**

# Worksheet 4: Self Reflection Questions

4.1 What was successful/worked in this exercise?

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4.2 Would you have approached the scenario in real life the way you did it in this exercise? Why/why not?

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4.3 What did you say/hear that did not work or made the scenario’s outcome unsuccessful?

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4.4 What do you think you need to work on to improve your ability to sell over the telephone?

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