**10358 & 13883 Final Summative Assessment**

**NQF 2 Contact Centre Support ID 71490**

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

# Activity 1: Knowledge Questionnaire

Read the following knowledge questions carefully and write your answer in the space provided. The mark allocation will provide an indication of how comprehensive your response should be.

**Number Question Marks**

1. Match three (3) of the four (4) stages of call flow with the appropriate example: 3

A; Body of the call 1 “Welcome to Fitness World. Jack speaking. How may I help you?” B; Closing the call 2 “I can have your new equipment delivered at a time that suits you.”

C; Opening the call 3 “Would you like the calorie counter that fits on the machine?”

D; Chance to add value

1. Which four (4) of the following are stages of call flow? 4

A; The body of the call

B; The chance to identify market opportunities

C; The chance to add value

D; Following up on the call

E; Entering information into the customer database

F; Closing the call

G; Opening the call

1. John is a CSR who is about to take a call from a customer. Which of the four (4) 4

of the following are the typical stages of call flow that John should be aware of?

A; Reporting each call to his supervisor

B; Greeting the customer in a friendly and professional manner

C; Doing what is necessary to solve the customer’s problems

D; Treating every customer’s query in the same way

E; Reviewing what has been discussed and ensuring that the customer is satisfied

F; Taking advantage of the chance to add value to the call

1. Jillian knows that two of the steps in opening a call are to greet the customer 2 and identify herself and the company. She is going to make a conscious effort to do this in every call from now on. Which two (2) of the following are suitable greetings?

A; “Good morning. Welcome to TCA. How can I help you?”

B; Good morning. TCA. Jillian speaking.”

C; “Hi. Welcome to TCA. Jillian speaking.”

D; “TCA. Jillian speaking.”

E; “Hi. How can I be of help to you?”



1. In her call opening, Jillian has completed the first two steps – greeting and 2

identifying. The next step involved determining two (2) things. What are the two (2) things that Jillian has to determine in the opening of the call? A; The customer’s details

B; Why the customer has contacted the company

C; Who to refer the matter to

D; How to solve the customer’s problem

1. Jillian is now nearing the end of the opening of the call. There is one (1) step 1 that she should have been following throughout the call. Which one (1) of the four (4) steps should Jillian follow throughout the call?

A; Interpreting the customer’s personality

B; Greeting the customer

C; Identifying herself and the company

D; Determining the customer’s details and the reason for the contact

1. Which three (3) of the following are guidelines for handling the body of a call? 3

A; Ask the customer how you can help her

B; Do your best to solve the customer’s problem

C; Forward the call to your supervisor if necessary

D; make sure the customer hangs up first

E; Answer the call in less than four rings



1. Jill, a CSR with a cellphone company, is dealing with a talkative caller. She is very 2 busy and the caller is really holding her up. Which two (2) of the following should she do?

A; Focus on giving the caller what he wants

B; Be polite, yet firm

C; Interrupt the caller and explain that she has to go

D; Give the caller all the time he wants – it’s her job to listen



1. Jill is dealing with a confused customer. Which three (3) of the following should 3 she do?

A; Assure the customer that everything will be fine

B; Deal with all the points that cause confusion together

C; Speak calmly and softly

D; Offer simple explanations

1. Joan is a customer service representative in a contact centre. Which three (3) of 3

the following should Joan do during the body of the call?



A; Try to solve the customer’s problem

B; Ask the customer how she can help

C; Offer the customer free gifts

D; Escalate the call to the appropriate person

E; Add value to the call

1. Chloe is speaking with a customer and has explained about the different 1 payment options available to him. The customer seems pleased with the explanation. What should Chloe say at this stage?

A; “It doesn’t matter if you didn’t understand any of that. I’ll mail you a brochure and you can call me again if you still have questions.”

B; “Just to recap, there are three options: you can pay by direct debit, you can pay in cash at your bank each month or you can pay at any of our stores across the country.”

C; “Ok, if you’re happy with everything, that’s great. Thanks for calling and have a nice day.”



1. At the end of the next call, Chloe remembers to recap on what has been 1 discussed with the customer. When the customer confirms that she has understood, Chloe then says, “Thankyou for calling, Vicky. Good bye.” Is this the right thing for Chloe to say at this time?

A; Yes, she should close politely at this stage

B; No, she should ask the customer if she would like any further help

C; No, she should thank the customer and hang up

1. The next call is with a customer called Gena. After Chloe has reviewed the 1 conversation and offered more help, it is time for her to close the call politely. Which one (1) of the following should Chloe say?

A; “I think we’re done here. Good bye”

B; “Thankyou, Gena, for calling CoCom. Have a nice day.”

C; “Ok Gena. Catch ya later.”

D; “CoCom is always glad to be of service to a customer. Call again soon.”

1. Chloe is closing the call with a fourth customer. She has followed perfectly the 1 first three steps in closing a call, and the customer seems very pleased. What is the final thing that Chloe must remember?

A; She should summarise the main points of the call once more

B; She should hang up immediately and move to the next call

C; She should wait for the customer to hang up first



1. What is the value of company defined formats, responses and scripts? For 5 inbound? Four outbound?



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1. When should customer queries be escalated? To whom? 4

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1. What are customer expectations for follow ups? Why? 3

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## TOTAL: 40

Competence Rating:

The candidate must obtain an overall percentage of 75% to be declared competent.

# Activity 2: Practical Activity

Read the following practical application questions/scenarios. Write the answer in the space provided. The mark allocation will provide an indication of how comprehensive your response should be.

**Number Question Marks**

1 Identify a product which you can sell through a call centre. Choose a **60** product along the lines of a cellphone, insurance, medical aid, airtickets, travel packages, etc.

 Provide a sales script for this scenario:

You are calling a customer who have a left a message for a sales agent 30 to call him back about …. You call him back and he answers:

 Customer: “Hello, this is John speaking.”

 Agent: “ …………..”

Customer: “Yes, I have been expecting your call. I am interested in finding out more about ….., and possibly making a purchase.” Please

 tell me more.”

Please complete the dialogue/script until the end of the conversation where the order details are confirmed.

Please prepare an order form for the sale.

30

**TOTAL: 50**

**Competence Rating:**

The candidate must obtain an overall percentage of 75% to be declared competent.

# Activity 3: Workplace Evidence of Individual Performance on Call Handling

The following activity relates to your individual work and performance in your job. We have in other modules (Dealing with Customers, Collecting and Problem Solving and Performance Standards) asked for observation sheets to be completed to support your evidence in showing your ability to effectively manage telephone calls. This included evidence of you taking and making calls as well as operating computer systems and packages. This directly relates to your performance. You will now need to collect evidence of your performance over a two month period so that you can prove your ability to and competence in:

* 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

You can use the attached worksheet as a guideline of what is required for this activity.

By including and analysing 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.

Support your checklist with any workplace evidence (i.e. your quality assurance assessments, performance appraisal reports, target reports etc.) and make sure:

* You explain each piece of evidence collected
* Date and sign your evidence
* Get your supervisor to sign off to ensure that evidence is valid, your own work and a true reflection of the workplace industry requirements etc.

**Performance on Call Handling and Apply Company Procedures 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 4: Workplace Call Observation Sign Off (Inbound)

In **Module 3** (Dealing with Customers), **Module 5** (Collecting, Recording & Problem Solving in Contact Centre) and **Module 6** (Performance Standards in a Contact Centre) you collected call observation evidence to demonstrate your ability to apply skills to handle customer queries. While these may still apply to this module, we are going to ask you to provide evidence for more calls as they relate specifically to inbound and outbound contact centre activities and procedures.

For this activity you are going to be assessed by your workplace coach against the criteria of your company guidelines as well as the unit standard outcomes.

**INSTRUCTIONS to the LEARNER:**

**As part of this module, you are required to refresh your memory on the customer and contact centre/workplace specific guidelines you collected and explained in Module 3 (Dealing with Customers) and include anything else you feel you may not have included there that may be relevant here.**

**Record the evidence in the following 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)**  |
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**BEFORE YOU START with the OBSERVATIONS:**

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.

Photostat this checklist for as many times as you will be observed and support it with your workplace’s own call quality assurance checklists. You need to have a minimum of four of these sheets completed.

**INSTRUCTIONS to the COACH:**

1. **Your coach must assess you** at least 3 times **over the period of your workplace experience 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**

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

|  |  |  |  |
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| **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]  | **10358**  | **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 3 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.

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| **Unit Std Link**  | **Assessment Criteria**  | **C**  | **NY****C**  | **Not** **Observed**  | **Comments**  |
|  | **Retrieving calls**  |  |  |  |  |
| 10358 (SO1 AC1) (SO1AC2) (SO1AC3)   | Learner applies company specific procedures and methodologies in retrieving calls using company specified technology and systems accurately, effectively and timeously according to company specific timeframe requirements  |   |   |   |   |
|  | **Inputting Information**  |  |  |  |  |
| 10358 (SO2AC1) (SO2 AC2) (SO2 AC4) (SO2 AC5)   | Learner is able to identify the correct information and input it into the system accurately, consistently, according to the customer’s requirements and meets all company standards in doing so.  |   |   |   |   |
| 10358 (SO2AC3)   | Learner records the information in the agreed company standard timeframe  |   |   |   |   |
| 10358 (SO2AC6)   | Learners verifies the captured information according to company standard practices   |   |   |   |   |
|  | **Responding to customer needs and/ or requests and/ or queries**  |  |  |  |  |
| 10358 (SO3AC1) (SO3 AC4)  | Customer needs, requests, queries are responded to accurately by choosing the correct action to  |   |   |   |   |
| **Unit Std Link**  | **Assessment Criteria**  | **C**  | **NY****C**  | **Not** **Observed**  | **Comments**  |
|   | company specific requirements and providing relevant information to the customer  |  |  |  |  |
| 10358 (SO3AC2)   | Customers are responded to in accordance with company specific time limits and company specific procedures  |   |   |   |   |
|  | **Escalation situations**  |  |  |  |  |
| 10358 (SO4AC4)  | Learner informs the customer of escalation situations and follow-ups are passed on to relevant parties  |   |   |   |   |
|  | **Follow up Process**  |  |  |  |  |
| 10358 (SO4 AC1) (SO4AC2)  | Follow up procedures are conducted consistently with customer requirements  |   |   |   |   |
| 10358 (SO4AC3)  | Follow-ups are conducted timeously according to company specific timeframes  |   |   |   |   |
|  | **Knowledge and Understanding**  |  |  |  |  |
| EEK (10358)  | Through this call observation, the learner sufficiently demonstrated: * An understanding of Contact Centre practices and procedures.
* An understanding of business and client requirements.
* An understanding of industry specific products and services.
* An understanding of basic customer service principles.
* An understanding of questioning and responding techniques
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| **Date of feedback**  |  |
| **Areas to Develop:**  |  |
| **Areas of Strength:**  |  |
| **Learner Signature (in receipt of this feedback):**  |  |
| **Workplace Coach Signature:**  |  |

# Activity 5: Workplace Call Observation Sign Off (Outbound)

In **Module 3** (Dealing with Customers), **Module 5** (Collecting, Recording & Problem Solving in Contact Centre) and **Module 6** (Performance Standards in a Contact Centre) you collected call observation evidence to demonstrate your ability to apply skills to handle customer queries. While these may still apply to this module, we are going to ask you to provide evidence for more calls as they relate specifically to inbound and outbound contact centre activities and procedures.

For this activity you are going to be assessed by your workplace coach against the criteria of your company guidelines as well as the unit standard outcomes.

This activity relates to an OUTBOUND call interaction and if your workplace is not outbound, a simulation or opportunity to conduct an outbound call activity must be arranged.

**INSTRUCTIONS to the LEARNER:**

**As part of this module, you are required to refresh your memory on the customer and contact centre/workplace specific guidelines you collected and explained in Module 3 (Dealing with Customers) and include anything else you feel you may not have included there that may be relevant here.**

**Record the evidence in the following 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)**  |
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**BEFORE YOU START with the OBSERVATIONS:**

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.

Photostat this checklist for as many times as you will be observed and support it with your workplace’s own call quality assurance checklists. You need to have a minimum of four of these sheets completed.

**INSTRUCTIONS to the COACH:**

1. **Your coach must assess you** at least 2 times **over the period of your workplace experience 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**

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]  | **13885**  | **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 2 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.

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| **Unit Std Link**  | **Assessment Criteria**  | **C**  | **NY****C**  | **Not** **Observed**  | **Comments**  |
|  | **Placing calls**  |  |  |  |  |
| 13885 (SO1 AC1) (SO1AC2)  | Learner applies company specific procedures, technologies, systems and workplace instructions in placing calls to customers  |   |   |   |   |
|  | **Recording Information**  |  |  |  |  |
| 13885 (SO1AC3) (SO2 AC3)  | Learner provides relevant accurate information to the customer  |   |   |   |   |
| 13885 (SO2AC1) (SO2 AC2) (SO2 AC4) (SO2 AC5)   | Learner is able to identify the correct information and input it into the system accurately, consistently, according to the customer’s requirements and meets all company standards in doing so.  |   |   |   |   |
| 13885 (SO2AC3)   | Learner records the information in the agreed company standard timeframe  |   |   |   |   |
| 13885 (SO2AC6)   | Learners verifies the captured information according to company standard practices   |   |   |   |   |
|  | **Responding to customer needs and/ or requests and/ or queries**  |  |  |  |  |

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| **Unit Std Link**  | **Assessment Criteria**  | **C**  | **NY****C**  | **Not** **Observed**  | **Comments**  |
| 13885 (SO3AC1) (SO3 AC4)   | Customer needs, requests, queries are responded to accurately by choosing the correct action to company specific requirements and providing relevant information to the customer  |   |   |   |   |
| 13885 (SO3AC2)   | Customers are responded to in accordance with company specific time limits and company specific procedures  |   |   |   |   |
|  | **Sales Transaction/Skills**  |  |  |  |  |
| 13885 (SO4AC2) (SO4 AC5)  | Learner concludes the transaction when the sale/action is confirmed by the customer and is consistent with the customer's requirements  |   |   |   |   |
| 13885 (SO4AC1) (SO4 AC4)  | Learner concludes the transaction within the company specific timeframe and is accurate in all aspects of the transaction  |   |   |   |   |
| 13885 (SO4AC3)  | Learner follows contact centre specific scripting or response requirements  |   |   |   |   |
|  | **Escalation situations**  |  |  |  |  |
| 13885 (SO4AC4)  | Learner informs the customer of escalation situations and follow-ups are passed on to relevant parties  |   |   |   |   |
|  | **Follow up Process**  |  |  |  |  |
| 13885 (SO4 AC1) (SO4AC2)  | Follow up procedures are conducted consistently with customer requirements  |   |   |   |   |
| 13885 (SO4AC3)  | Follow-ups are conducted timeously according to company specific timeframes  |   |   |   |   |
|  | **Closing calls**  |  |  |  |  |
| 13885 (SO1 AC4)  | Learner conducts and closes the call within the set company agreed timeframe  |   |   |   |   |
| **Unit Std Link**  | **Assessment Criteria**  | **C**  | **NY****C**  | **Not** **Observed**  | **Comments**  |
|   | **Knowledge and Understanding**  |  |  |  |  |
| EEK (13885)  | Through this call observation, the learner sufficiently demonstrated: * A general understanding of Contact Centre practices and procedures.
* A basic understanding of business and client requirements.
* An in-depth understanding of industry specific products and services.
* A basic understanding of basic customer service principles.
* A thorough understanding of communication and listening techniques and methods.
* A basic understanding of sales techniques
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| **Date of feedback**  |  |
| **Areas to Develop:**  |  |
| **Areas of Strength:**  |  |
| **Learner Signature (in receipt of this feedback):**  |  |
| **Workplace Coach Signature:**  |  |