**10348 LEARNER FORMATIVE ASSESSMENT PACK**

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| **Learner Name:** |  |
| **Learner ID Number:** |  |
| **Group:** |  |
| **Date of Completion:** |  |
| **Signature to verify that this is my own work:** |  |

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** |
| 10348 | **Identify and respond to customer needs in a Contact**  **Centre** | SO 1:  Identify customer needs in a Contact  Centre | 1.  2.  3.  4. | Customers’ needs are correctly identified through appropriate questioning and listening techniques. A correct understanding of customers’ needs is demonstrated by applying industry special responses Customers’ needs are identified within company specific time frames.  Company specific prompts and procedures are consistently followed. | 2 (12) |  |  |  |
| SO2 : Respond to customer needs in a Contact  Centre | 1.  2.  3. | Customer needs are responded to accurately according to company specific requirements.  Customers are responded to in accordance with company specific time limits and Service level Agreements.  Responses comply with company specific requirements. |  |  |  |
|  |  |  | 4. | Accuracy is confirmed by the customer. |  |  |  |  |

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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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| **Class Activity 2: Identify customer needs** In small groups, complete the following: | | | 10348.1.1 |
| 2.1 List 5 of the most common queries and complaints you have to deal with on a regular basis: | | | |
|  | 2.2 principles:  **Focus and Belief in the power of customer service** | Explain what your company does to comply with the following customer  service | |  |
| **Establish**  **Relationships** |  | |
| **Commit to**  **Excellence** |  | |

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| **Create Happy**  **Employees** |  | |
| **Measure**  **Performance** |  | |
|  | 2.3 Explain what you say in each of the following steps during a call: | | | | |
| **Call opening** | |  | |  |
| **Identification** | |  | |
| **Customer requirements** | |  | |
| **Offer** | |  | |
| **Close** | |  | |

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| 2.4 List 5 examples of jargon or abbreviations used by staff in your workplace and then explain them in layman’s terms:   |  |  | | --- | --- | | **Jargon** | **Explanation** | |  |  | |  |  | |  |  | |  |  | |  |  | |
| 2.5 Customers' needs are correctly identified through appropriate questioning and listening techniques  With your partner, role play a customer interaction where you, the agent, try to determine the customer’s needs through effective question and listening. A third learner must observe the interaction and give feedback on the following aspects:   * The agent built rapport with the caller * The agent displayed empathy * The agent’s greetings were friendly, polite and according to company requirements * The agent used verbal encouragers   Swop roles until all learners have had a turn to be the agent    Write down feedback on how the role play went and what can be improved on (if any): |
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| **Class Activity 3: Understand and Respond to the Customers’ Needs**  In small groups, complete the following: | | | 10348.1.2 | |
| 3.1 With your partner, role play the following call, substituting company specific terms where applicable:  Shane: How can I help you, Natasha?  Natasha: I ………………………………………………………………….!  Shane: (During a quick pause) Right.  Natasha But ………………………………………………………………  Shane: I see. I’m sure it was very frustrating. ……………………………..  Natasha: Yes, ……………………………… Shane: ………………………………………………….? Natasha: No, ……………………………………..  Shane: So …………………………………………………………….. Is this correct? | | | | |
| 3.2 Design 5 closed questions that you can use when dealing with your customers: | | | | |
| 3.3 Design 5 open-ended questions that you can use when dealing with your customers: | | | | |
| 3.4 List 5 of the products/services offered by your company: | | | | |
| 3.5 Describe your company policies and procedures in the following instances: | | | | |
|  | **Situation** | **Policy/procedure** | |  |
| Complaints about staff |  | |
| Account queries |  | |
| Complaint escalation |  | |
| Occupational Health and Safety |  | |
| Privacy/confidentiality |  | |
| Complaints about product/service |  | |

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| **Class Activity 4: Work within Company Specific Timeframes**  In small groups, complete the following: | 10348.1.3 |
| Describe your company’s policies and procedures regarding timeframes:   |  |  | | --- | --- | | **Measurements** | **Timeframe** | | Daily targets |  | | Call duration |  | | Time taken to resolve a query |  | | Response time |  | | |

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| **Class Activity 5: Follow Prompts and Procedures** In small groups, complete the following: | 10348.1.4 |
| Describe how your company specific prompts and procedures comply with the best practice guidelines in the Learner Guide:   |  |  | | --- | --- | | **Best practice** | **What we do** | | **Easy to use** |  | | **Caller control** |  | | **Consistency** |  | | **Ways in and out of the system** |  | | **Natural speaking voice** |  | | **Personalise caller’s experience** |  | | |

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| **Class Activity 6: Respond Accurately to Customer Needs**  In small groups, complete the following: | | | 10348.2.1 | |
| 6.1 Give a description of what you must know and/do in each of the following instances: | | | | |
|  |  | **What I need to know/do** | |  |
| Who in the contact centre is able to give help and information |  | |
| The limits of what I am allowed to do |  | |
| What professional behaviour is |  | |
| How to speak to people who are dissatisfied |  | |
| How to deal with difficult people |  | |
| What customers normally expect |  | |
| How to recognise a problem from what a customer says or does |  | |
| What kinds of behaviours/actions would make situations worse |  | |
| The organisational procedures I must follow when I deal with  problems or complaints |  | |
| 6.2 Select one of your company’s products/services and describe its features (what it looks like; does, etc.) as well as its benefits (what it can do for the customer)     |  |  | | --- | --- | | **Features** |  | | **Benefits** |  | | | | | |

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| **Class Activity 7: Respond by Complying with Company Specific Requirements**  In small groups, complete the following: | 10348.2.2,3 |
| What do you understand by a Service Level Agreement? How does it impact upon your job? Why do you think it is necessary in terms of delivering excellent customer service? | |

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| **Class Activity 8: Confirm Accuracy with the Customer**  In small groups, complete the following: | 10348.2.4 |
| With your partner, role play a scenario where your customer has expressed a need and you are now offering a solution based on the products or services your company offers. Remember to:   1. Acknowledge the customer's need 2. Introduce the appropriate solution(s) that will satisfy the need     Write down the scenario and how you confirmed accuracy. What worked well or what can be improved on? | |