**10349 & 10353 FORMATIVE ASSESSMENT PACK: Meet Performance Standards in a Contact Centre**

 **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**  |
| 10349  | **Input data received onto appropriate computer packages within a Contact** **Centre**  | SO 1: Demonstrate and apply knowledge of computer packages within a Contact Centre  | 1. Knowledge of company specific computer packages is demonstrated
2. An understanding of company specific packages and applications is demonstrated and applied
3. Applications are accurately applied within company specific contexts
4. Confidence is displayed in company specific packages within a Contact Centre
 | NQF 2 (12)  |   |   |   |
| SO2: Input data onto company specific packages within a Contact Centre  | 1. Data is inputted accurately
2. Data is inputted within company specific timeframes
3. Data captured is relevant and consistent with company specific formats and requirements.
4. Critical and closest routes are followed when inputting data onto packages
5. Tasks are completed within the company's specific timeframe
 |   |   |   |
| **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: Verify data onto company specific packages within a Contact Centre  | 1. Data is verified against the source of information
2. Inaccuracies are identified and rectified correctly
3. Company specific follow up and close procedures are followed
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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**  | **Evidence** **Provided/** **Referenced**  | **Learner Notes/ Comments**  | **Assessment** **Decision** **C/NYC**  |
| 10353  | **Meet** **Performance Standards within a Contact** **Centre**  | SO 1: Use a computerised system  | 1. Relevant data is input accurately into specific Contact Centre packages
2. Data is retrieved accurately from specific Contact Centre packages
3. All logging procedures are correctly used as per company specific systems
4. All industry specific security and confidentiality requirements are complied with
5. Specific statistical data is understood. RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped Contacts
 | NQF 2 (6)  |   |   |   |
| SO2: Respond to calls or other forms of communication RANGE: Inbound or outbound Assessment Criteria  | 1. Company specific time targets are met. RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped calls
2. The customer's requests are understood
3. Customer's requests are responded to according to company specific procedures.
4. Other forms of communication are considered and applied using standard industry practices. RANGE: May include but not be limited to quantity, duration, wrap, hold and dropped Contacts
5. Answer calls according to company specific greeting
6. Close calls in accordance with the context of the call with a call centre
7. Calls and customers are responded to in the appropriate language or medium
 |   |   |   |
|   |   | SO3: Follow-up customer queries  | 1. Electronic communication systems are utilised effectively. RANGE: Includes but is not limited to faxing, e-mailing, printing, photocopying, telephone  |   |   |   |   |
| **Unit Std ID No.**  | **Unit** **Standard** **Title**  | **Specific Outcome**  | **Assessment Criteria**  | **NQF** **Level** **&** **Credits**  | **Evidence** **Provided/** **Referenced**  | **Learner Notes/ Comments**  | **Assessment** **Decision** **C/NYC**  |
|  |  |  | 2. Manual administrative information is accurately completed as per company specific procedures and time frames  |  |  |  |  |

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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:

1.1 Can you explain, with the use of a researched example, the system and computer packages that can exist in a Contact Centre. By identifying it, explain the purpose and what an agent would use it for in their daily tasks:

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1.2 Can you name some computer programmes that can be used in a Contact Centre to communicate with customers?

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**Activity 2:**

This is a research activity that requires you and your group to research a workplace or through conducting of research.

In your groups (of 4 or less members) brainstorm the following with regards to your workplace/research about contact centres and present to the class:

1. What Computer based CRM (or similar) package do you use in your Contact Centre 2. What is the purpose of this programme?

1. Does the programme record calls?
2. How does it identify the calls it has recorded?
3. Why does the programme record calls – for what purpose?
4. How is information on the system verified?
5. How is information stored and or inputted in the system?
6. How much time does an Agent have to make a call to a customer?
7. What reports can this programme give the company? Name them
8. Does your programme highlight mistakes if made by the Agent? Explain your answer.

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**Activity 3:**

* 1. In following up with customer, can you identify and explain the procedure you would follow in sending emails or a fax to a customer (this can be supported by evidence you have research).

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* 1. In the event that a Contact Centre does not offer an email/fax follow up service to customers, how would they communicate with their customers?

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| **Activity 4:**  |  |

You will be paired up by your facilitator into groups of two people. Read the following scenario and prepare a role play around the key skills we have been learning in this module. You need to ensure that both of you get a chance to play each role so that you both have the opportunity to be the contact centre agent.

This scenario deals with making and dealing with a customer query. Remember that the important aspects of verifying a customer in relation to the data you will be “capturing” and collecting also forms part of this role play.

When you have finished the role play make sure you answer the self reflection questions that follow.

**The Scenario - Learner A (employee)**

You are an employee for a company called OFFICE DELUXE who sells office equipment. In the table below is information about the printers you sell. Study it before you begin the role play.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PRODUCT**  | **Reference Number**  | **Unit Price in R**  | **Availability**  | **Delivery time from** **Order**  | **Cost of Delivery**  |
| GH 100 b/w printer  | GH100/56L  | R1000.00  | In stock  | 3 days  | R100.00  |
| GH 200 b/w printer  | GH200/84K  | R1500.00  | 2 weeks  | 3 days  | R100.00  |
| JB45 colour printer  | JB45/452G  | R2000.00  | 1 week  | 3 days  | R125.00  |
| JB55 colour printer  | JB55/245K  | R2500.00  | 3 weeks  | 3 days  | R125.00  |
| CV 1000 b/w laser printer  | CV1000/45K  | R5000.00  | In stock  | 3 days  | R300.00  |
| CV 2000 b/w laser printer  | CV20000/85B  | R6000.00  | 4 days  | 3 days  | R300.00  |
| CV 5000 colour laser printer  | CV5000/75D  | R10 000.00  | 4 weeks  | 3 days  | R500.00  |

**Consider this in your planning:**

The customer may want you to send more information to him so make sure you get all his/her details. The customer may also be an existing customer and may exist on your database.

**The Scenario – Learner B (Customer)**

You are interested in buying a new printer for your office. Phone OFFICE DELUXE to enquire about the printers they sell. Take down any information they may give you in the notes sheet provided.

Before you start you may like to think about which type of printer you are interested in. Do you want a colour or just black and white printer? Are you interested in a laser printer? Do you want the latest model? How much are you prepared to spend?

# 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: 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:**

|  |  |
| --- | --- |
| *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  |
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| 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 overcome customer’s objections/difficult situations.?

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**Activity 5:**

5.1 From the article on KPIs, summarise those computer and data packages that are used in your contact centre as a means to measure and monitor performance.

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5.2 From the article, do you agree that data driven sources are a valid and reliable base to use for customer information, performance metrics and measure. Use examples to justify you opinion.

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