**10349 & 10353 Final Summative Assessment**

**NQF 2 Contact Centre Support ID 71490 LP 73269**

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

# Marking Grid: (For Office Use ONLY)

|  |  |
| --- | --- |
| **Marked By:**  |  |
| **Date:**  |  |
| **Competent**  | **Not Yet Competent**  |
| **Assessor Sign off:**  |  |
| **Notes:**  |  |
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# Activity 1: Workplace Evidence/Activities

In preparing for your final summative assessment which are observation and workplace based, you will be required to show evidence to demonstrate your skill and competence in using your computer skills and customer service knowledge. To assist the assessor in evaluating this, it is important you include:

1. Write down/provide a record of any computer or **internal systems/computer training** you may have attended from your workplace. This will assist in demonstrating you have the knowledge to operate the systems and packages.

1. Supply copies of **emails or any written communication** as proof of following up with customers.

1. Explain your **time and other quality targets for your calls** so that all company guidelines being observed are confirmed.

**Make sure you sign all your evidence and that your workplace coach validates (makes sure what you are providing from the workplace is true), checks and signs off anything you provide from the workplace.**

# Activity 2: US 10349 Workplace Observation Sign Off

You are required to be observed in handling data and the computer system for at least **four customer interactions/calls**. Your workplace coach or QA supervisor will need to observe this and complete the following checklist for each interaction.

Where possible, you are encouraged to **include screen dumps or evidence of accurate capturing data** for at least one observation and all evidence must be signed by yourself and your workplace coach.

**10349 - Input data received onto appropriate computer packages within a Contact Centre**

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(in my capacity as workplace coach), I confirm that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has achieved/not achieved the following outcomes:

|  |  |
| --- | --- |
| **Obseration Number:**  | 1  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| **SO 1: Knowledge, Understanding and Application of computer packages within a contact centre**  |
| AC1 AC2 AC3  | Learner is able to demonstrate knowledge and understanding of company specific computer packages by accurately applying, using and navigating the system correctly.  |   |   |   |
| AC4  | Learners shows self confidence when working with company specific packages  |   |   |  |
| **SO 2: Input data onto computer specific packages within a contact centre**  |
| AC1 AC2 AC5  | Learner inputs data accurately and within company specific timeframes  |   |   |  |
| AC3  | Data captured is relevant and consistent with company specific formats and requirements  |   |   |  |
| AC4  | Learner applies critical and closest routes when inputting data onto packages  |   |   |  |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| **SO 3: Verify data onto company specific packages within a contact centre**  |
| AC1  | Learner verifies data against the source of information  |   |   |  |
| AC2  | Learner correctly identifies and rectifies inaccuracies  |   |   |  |
| AC3  | Learner follows company specific follow up and close procedures  |   |   |  |
| **Essential Embedded Knowledge – did the learner show application and understanding of in this interacation:**  |
| * A general understanding of the methods and techniques for communication and listening.
* A basic understanding of customer service principles.
* An in-depth understanding of company specific packages.
* An in-depth understanding of company products and services.
* A comprehensive understanding of Contact Centre specific computer packages
 |   |   |  |

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| **Learner’s feedback or response to workplace coach comments. What can I improve on:**  |          |
| **Supporting evidence referenced (if any):**  |       |
| **Learner Signature:**  |   |

**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(in my capacity as workplace coach), I confirm that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has achieved/not achieved the following outcomes:

|  |  |
| --- | --- |
| **Obseration Number:**  | 2  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

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| --- | --- | --- | --- |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| **SO 1: Knowledge, Understanding and Application of computer packages within a contact centre**  |
| AC1 AC2 AC3  | Learner is able to demonstrate knowledge and understanding of company specific computer packages by accurately applying, using and navigating the system correctly.  |   |   |   |
| AC4  | Learners shows self confidence when working with company specific packages  |   |   |  |
| **SO 2: Input data onto computer specific packages within a contact centre**  |
| AC1 AC2 AC5  | Learner inputs data accurately and within company specific timeframes  |   |   |  |
| AC3  | Data captured is relevant and consistent with company specific formats and requirements  |   |   |  |
| AC4  | Learner applies critical and closest routes when inputting data onto packages  |   |   |  |
| **SO 3: Verify data onto company specific packages within a contact centre**  |
| AC1  | Learner verifies data against the source of information  |   |   |  |
| AC2  | Learner correctly identifies and rectifies inaccuracies  |   |   |  |
| AC3  | Learner follows company specific follow up and close procedures  |   |   |  |
| **Essential Embedded Knowledge – did the learner show application and understanding of in this interacation:**  |
| * A general understanding of the methods and techniques for communication and listening.
* A basic understanding of customer service principles.
* An in-depth understanding of company specific packages.
* An in-depth understanding of company products and services.
* A comprehensive understanding of Contact Centre specific computer packages
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| **Learner’s feedback or response to workplace coach comments. What can I improve on:**  |          |
| **Supporting evidence referenced (if any):**  |       |
| **Learner Signature:**  |   |

**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(in my capacity as workplace coach), I confirm that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has achieved/not achieved the following outcomes:

|  |  |
| --- | --- |
| **Obseration Number:**  | 3  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

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| --- | --- | --- | --- |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| **SO 1: Knowledge, Understanding and Application of computer packages within a contact centre**  |
| AC1 AC2 AC3  | Learner is able to demonstrate knowledge and understanding of company specific computer packages by accurately applying, using and navigating the system correctly.  |   |   |   |
| AC4  | Learners shows self confidence when working with company specific packages  |   |   |  |
| **SO 2: Input data onto computer specific packages within a contact centre**  |
| AC1 AC2 AC5  | Learner inputs data accurately and within company specific timeframes  |   |   |  |
| AC3  | Data captured is relevant and consistent with company specific formats and requirements  |   |   |  |
| AC4  | Learner applies critical and closest routes when inputting data onto packages  |   |   |  |
| **SO 3: Verify data onto company specific packages within a contact centre**  |
| AC1  | Learner verifies data against the source of information  |   |   |  |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| AC2  | Learner correctly identifies and rectifies inaccuracies  |   |   |  |
| AC3  | Learner follows company specific follow up and close procedures  |   |   |  |
| **Essential Embedded Knowledge – did the learner show application and understanding of in this interacation:**  |
| * A general understanding of the methods and techniques for communication and listening.
* A basic understanding of customer service principles.
* An in-depth understanding of company specific packages.
* An in-depth understanding of company products and services.
* A comprehensive understanding of Contact Centre specific computer packages
 |   |   |  |

|  |  |
| --- | --- |
| **Learner’s feedback or response to workplace coach comments. What can I improve on:**  |          |
| **Supporting evidence referenced (if any):**  |       |
| **Learner Signature:**  |   |

**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(in my capacity as workplace coach), I confirm that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has achieved/not achieved the following outcomes:

|  |  |
| --- | --- |
| **Obseration Number:**  | 4  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

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| --- | --- | --- | --- |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| **SO 1: Knowledge, Understanding and Application of computer packages within a contact centre**  |
| AC1 AC2 AC3  | Learner is able to demonstrate knowledge and understanding of company specific computer packages by accurately applying, using and navigating the system correctly.  |   |   |   |
| AC4  | Learners shows self confidence when working with company specific packages  |   |   |  |
| **SO 2: Input data onto computer specific packages within a contact centre**  |
| AC1 AC2 AC5  | Learner inputs data accurately and within company specific timeframes  |   |   |  |
| AC3  | Data captured is relevant and consistent with company specific formats and requirements  |   |   |  |
| AC4  | Learner applies critical and closest routes when inputting data onto packages  |   |   |  |
| **SO 3: Verify data onto company specific packages within a contact centre**  |
| AC1  | Learner verifies data against the source of information  |   |   |  |
| AC2  | Learner correctly identifies and rectifies inaccuracies  |   |   |  |
| AC3  | Learner follows company specific follow up and close procedures  |   |   |  |
| **Essential Embedded Knowledge – did the learner show application and understanding of in this interacation:**  |
| * A general understanding of the methods and techniques for communication and listening.
* A basic understanding of customer service principles.
* An in-depth understanding of company specific packages.
* An in-depth understanding of company products and services.
 |   |   |  |
| **Assessment Criteria**  | **Coach** **Signature** **(initials)**  | **Outcome &** **Criteria Met?** {Y/N}  | **Comments – please include** **DETAILED COMMENTS as** **feedback to the learner (for praise/improvement)**  |
| • A comprehensive understanding of Contact Centre specific computer packages  |  |  |  |

|  |  |
| --- | --- |
| **Learner’s feedback or response to workplace coach comments. What can I improve on:**  |          |
| **Supporting evidence referenced (if any):**  |       |
| **Learner Signature:**  |   |

**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

# Activity 3: US 10353 Workplace Observation Sign Off

You are required to be observed in handling data and the computer system for at least **four customer interactions/calls** (these can be the same calls/observations as **Activity 2**). Your workplace coach or QA supervisor will need to observe this and complete the following checklist for each interaction.

Where possible, you are encouraged to **include screen dumps or evidence of accurate capturing data** for at least one observation and all evidence must be signed by yourself and your workplace coach.

**10353 - Meet performance standards within a Contact Centre (NQF 2; 6 Credits)**

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(in my capacity as workplace coach), I confirm that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has achieved/not achieved the following outcomes:

|  |  |
| --- | --- |
| **Obseration Number:**  | 1  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Criteria**  | **Assessor** **Signature**  | **Outcome &** **Criteria Met?** {C/NYC}  | **Comments**  |
| **SO 1: Use a computerized system**  |  |  |
| AC1  | Learner inputs data accurately into specific Contact Centre packages  |   |   |   |
| AC2  | Learner retrieves data accurately from specific Contact Centre packages  |   |   |  |
| AC3  | All logging procedures are correctly used as per company specific systems  |   |   |  |
| AC4  | Industry specific security & confidentiality requirements are complied with  |   |   |  |
| AC5  | Specific statistical data is understood. (May include but not be limited to quantity, duration, wrap, hold and dropped Contacts)  |   |   |  |
| **SO 2: Respond to calls or other forms of communication**  |
| **Assessment Criteria**  | **Assessor** **Signature**  | **Outcome &** **Criteria Met?** {C/NYC}  | **Comments**  |
| AC5 AC7  | Learner answers calls according to company specific greeting and communicated with in the appropriate language or medium  |   |   |   |
| AC1  | Company specific time targets are met. (May incl. but not be limited to quantity, duration, wrap, hold & dropped calls.)  |   |   |   |
| AC2 AC3  | The customer’s requests are understood and requests are responded to according to company specific procedures  |   |   |  |
| AC4  | Other forms of communication are considered and applied using standard industry practices. (May include but not be limited to quantity, duration, wrap, hold and dropped Contacts.)  |   |   |   |
| AC6  | Learner closes calls in accordance with the context of the call with a call centre procedures  |   |   |   |
| **SO 3: Follow – up customer queries**  |
| AC1  | Learner uses electronic communication systems effectively. (Includes but is not limited to faxing, emailing, printing, photocopying, telephone  |   |   |   |
| AC2  | Learner completes manual administrative information accurately as per company specific procedures and time frames  |   |   |   |
| **Essential Embedded Knowledge – did the learner show application and understanding of in this interacation:**  |
| * A basic knowledge and understanding of various computer applications, including but not limited to Internet and e-mail
* A general understanding of Contact Centre guidelines and industry specific products
* A basic understanding of customer service principles
* An in-depth understanding of the methods and techniques for communication, listening and call closing
* A thorough understanding of company specific greetings
 |   |   |  |

|  |  |
| --- | --- |
| **Learner’s feedback or response to workplace coach comments. What can I improve on:**  |          |
| **Supporting evidence referenced (if any):**  |    |
|  |     |
| **Learner Signature:**  |   |

**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

|  |  |
| --- | --- |
| **Obseration Number:**  | 2  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Criteria**  | **Assessor** **Signature**  | **Outcome &** **Criteria Met?** {C/NYC}  | **Comments**  |
| **SO 1: Use a computerized system**  |  |  |
| AC1  | Learner inputs data accurately into specific Contact Centre packages  |   |   |   |
| AC2  | Learner retrieves data accurately from specific Contact Centre packages  |   |   |  |
| AC3  | All logging procedures are correctly used as per company specific systems  |   |   |  |
| AC4  | Industry specific security & confidentiality requirements are complied with  |   |   |  |
| AC5  | Specific statistical data is understood. (May include but not be limited to quantity, duration, wrap, hold and dropped Contacts)  |   |   |  |
| **SO 2: Respond to calls or other forms of communication**  |  |  |
| AC5 AC7  | Learner answers calls according to company specific greeting and communicated with in the appropriate language or medium  |   |   |   |
| AC1  | Company specific time targets are met. (May incl. but not be limited to quantity, duration, wrap, hold & dropped calls.)  |   |   |   |
| AC2 AC3  | The customer’s requests are understood and requests are responded to according to company specific procedures  |   |   |  |
| AC4  | Other forms of communication are considered and applied using standard industry practices. (May include but not be limited to quantity, duration, wrap,  |   |   |   |
|  | mailing, printing, photocopying, telephone  |  |  |  |
| AC2  | Learner completes manual administrative information accurately as per company specific procedures and time frames  |   |   |   |
| **Essential Embedded Knowledge – did the learner show application and understanding of in this interacation:**  |
| * A basic knowledge and understanding of various computer applications, including but not limited to Internet and e-mail
* A general understanding of Contact Centre guidelines and industry specific products
* A basic understanding of customer service principles
* An in-depth understanding of the methods and techniques for communication, listening and call closing
* A thorough understanding of company specific greetings
 |   |   |  |

|  |  |
| --- | --- |
| **Learner’s feedback or response to workplace coach comments. What can I improve on:**  |          |
| **Supporting evidence referenced (if any):**  |       |
| **Learner Signature:**  |   |

**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

|  |  |
| --- | --- |
| **Obseration Number:**  | 3  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Criteria**  | **Assessor** **Signature**  | **Outcome &** **Criteria Met?** {C/NYC}  | **Comments**  |
| **SO 1: Use a computerized system**  |  |  |
| AC1  | Learner inputs data accurately into specific Contact Centre packages  |   |   |   |
| AC2  | Learner retrieves data accurately from specific Contact Centre packages  |   |   |  |
| AC3  | All logging procedures are correctly used as per company specific systems  |   |   |  |
| AC4  | Industry specific security & confidentiality requirements are complied with  |   |   |  |
| AC5  | Specific statistical data is understood. (May include but not be limited to quantity, duration, wrap, hold and dropped Contacts)  |   |   |  |
| **SO 2: Respond to calls or other forms of communication**  |  |  |
| AC5 AC7  | Learner answers calls according to company specific greeting and communicated with in the appropriate language or medium  |   |   |   |
| AC1  | Company specific time targets are met. (May incl. but not be limited to quantity, duration, wrap, hold & dropped calls.)  |   |   |   |
| AC2 AC3  | The customer’s requests are understood and requests are responded to according to company specific procedures  |   |   |  |
| AC4  | Other forms of communication are considered and applied using standard industry practices. (May include but not be limited to quantity, duration, wrap,  |   |   |   |



**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |

|  |  |
| --- | --- |
| **Obseration Number:**  | 4  |
| **Date of Observation:**  |   |
| **Time of Observation:**  |   |
| **Call Reference Number:**  |   |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment Criteria**  | **Assessor** **Signature**  | **Outcome &** **Criteria Met?** {C/NYC}  | **Comments**  |
| **SO 1: Use a computerized system**  |  |  |
| AC1  | Learner inputs data accurately into specific Contact Centre packages  |   |   |   |
| AC2  | Learner retrieves data accurately from specific Contact Centre packages  |   |   |  |
| AC3  | All logging procedures are correctly used as per company specific systems  |   |   |  |
| AC4  | Industry specific security & confidentiality requirements are complied with  |   |   |  |
| AC5  | Specific statistical data is understood. (May include but not be limited to quantity, duration, wrap, hold and dropped Contacts)  |   |   |  |
| **SO 2: Respond to calls or other forms of communication**  |  |  |
| AC5 AC7  | Learner answers calls according to company specific greeting and communicated with in the appropriate language or medium  |   |   |   |
| AC1  | Company specific time targets are met. (May incl. but not be limited to quantity, duration, wrap, hold & dropped calls.)  |   |   |   |
| AC2 AC3  | The customer’s requests are understood and requests are responded to according to company specific procedures  |   |   |  |
| AC4  | Other forms of communication are considered and applied using standard industry practices. (May include but not be limited to quantity, duration, wrap,  |   |   |   |



**Assessor Sign Off:**

|  |  |
| --- | --- |
| **Competent**  | **Not yet competent**  |
| **Assessor**  | **Moderator**  |
|  | **Re-assessed**  |
| **Re-assessed**  | **Final Outcome**  |