

**ASSESSMENT PLAN**

Personal assessment plan for: \_\_\_\_\_ NZQA No: \_\_\_\_\_

Unit Standard No: 11815 Level: 3 Credit: 4

Unit Standard Title: Answer customer enquiries on the telephone in a wide range of contexts

**Time frame (for assessment):** \_\_\_\_\_

<b>Evidence records</b> <i>(delete if not required)</i>	<b>No.</b>	<b>Date Required</b>
Observations Checklist		
Question Bank/Discussion		
Third Party Verification		
Questionnaires		
Tests/Exercises		
Workplace Documents (Verified by Team Leader) <i>(List Workplace Documents Required Below)</i>		
Other		

Refer to the Evidence Guide and Unit Standard for assessment details.

**Equipment:** (detail)

\_\_\_\_\_

**Progress Interviews:** (set dates)

**Appeals Process Discussed** Yes/No

**Special Requirements:** Yes/No (Detail)

\_\_\_\_\_

**Signed:** Assessor: \_\_\_\_\_

Candidate: \_\_\_\_\_

Date: \_\_\_\_\_

## EVIDENCE GUIDE

### UNIT STANDARD: 11815 – Answer customer enquiries on the telephone in a wide range of contexts

Element 1: Greet customer on the telephone, identify customer needs and expectations, and gain agreement on requirements

Element 2: Analyse customer needs and expectations and identify options to meet them

Element 3: Meet customer needs

Element 4: Close call and complete documentation and follow up requirements

Elements & Performance Criteria	Evidence	Judgement	Notes	Competency C/NYC
1.1, 1.2, 1.6, 2.1, 2.2, 3.1-3.4, 4.1-4.3	Observation	Observations show the ability of the candidate to carry out customer service processes as per workplace requirements.		
1.3, 1.4, 1.5, 3.3	<ul style="list-style-type: none"> <li>• Questions/Discussion relating to:</li> <li>• Stressful customers</li> <li>• Special Needs customers</li> <li>• Minority cultural customers</li> <li>• Referring work/questions to correct area</li> </ul>	Answers to questions are correct as per workplace requirements on customer service processes.		
3.4	Workplace Documents.	Customer information is recorded to meet workplace requirements.		

**Assessment Decision:**            **COMPETENT**

**NOT YET COMPETENT**

#### Re-assessment Plan

**Signed:** Assessor: \_\_\_\_\_  
 Assessor No: \_\_\_\_\_  
 Candidate: \_\_\_\_\_  
 Date: \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## OBSERVATION CHECKLIST

**UNIT STANDARD: 11815 - Answer customer enquiries on the telephone in a wide range of contexts**

*(All tasks observed must be correct for evidence of competence to apply)*

**Candidate's Name:** \_\_\_\_\_ **NZQA ID No:** \_\_\_\_\_

PC No.	Performance Criteria	Range	Notes	Competency C/NYC
1.1	Call is answered and customer is greeted in accordance with workplace procedures	Greeting requirements may include but are not limited to – <ul style="list-style-type: none"> <li>• standard welcome message</li> <li>• warmth and smile in voice</li> <li>• tone and modulation</li> <li>• courtesy</li> <li>• timeliness</li> <li>• grammar and syntax</li> </ul>		
1.2	Active listening skills are used to establish rapport with customer and identify customer needs and expectations	Active listening skills may include but are not limited to – <ul style="list-style-type: none"> <li>• full attention</li> <li>• open and closed questions</li> <li>• clarifying</li> <li>• reflecting</li> <li>• paraphrasing</li> <li>• summarising</li> <li>• using customer's name</li> </ul>		

PC No.	Performance Criteria	Range	Notes	Competency C/NYC
1.6	Needs and expectations are identified in accordance with organisational requirements and customer's agreement.	Accuracy, coverage, timeliness; needs and expectations identification process may include but is not limited to - computer software use and/or hard copy reference material.		
2.1, 2.2, 3.1, 3.2	Options for meeting customers' needs, expectations are explained and a course of action agreed where appropriate in accordance with workplace procedures.	Options and explanations may include but are not limited to – <ul style="list-style-type: none"> <li>• presentation of information</li> <li>• solutions</li> <li>• goods and services</li> <li>• products</li> <li>• referral to other area for product or service</li> <li>• referral to team leader</li> <li>• advantages/disadvantages of options</li> <li>• customer education where expectations are unrealistic</li> </ul>		

PC No.	Performance Criteria	Range	Notes	Competency C/NYC
3.3, 3.4	<p>Customer enquiries outside immediate job responsibilities are referred to appropriate provider in accordance with organisational requirements.</p> <p>Customer information is recorded in accordance with organisational requirements.</p>	<p>Recorded information may include but is not limited to –</p> <ul style="list-style-type: none"> <li>• date</li> <li>• enquiry</li> <li>• action taken</li> <li>• follow-up requirements</li> </ul>		
4.1	<p>Customer call is closed in accordance with workplace procedures.</p>	<p>Closure may include but is not limited to –</p> <ul style="list-style-type: none"> <li>• confirmation of agreement made</li> <li>• farewell statement</li> <li>• use of customer’s name</li> <li>• invitation to use goods/services again</li> <li>• thanks for patronage</li> <li>• positive verbal language</li> <li>• next course of action</li> </ul>		

PC No.	Performance Criteria	Range	Notes	Competency C/NYC
4.2	Documentation is completed in accordance with organisational requirements.	Documentation may include but is not limited to – <ul style="list-style-type: none"> <li>• records</li> <li>• legal requirements</li> <li>• bring-ups</li> <li>• escalations</li> </ul>		
4.3	Follow-up is completed in accordance with organisational requirements.	Follow-up may include but is not limited to – <ul style="list-style-type: none"> <li>• internal checks for progress (tracking)</li> <li>• progress reports to customers by phone, letter, fax, or e-mail;</li> <li>• “thank you” communications</li> <li>• apology letters for delays</li> <li>• promotional communication</li> </ul>		
	Course of action proposed in appropriate for customer needs, is in accordance with workplace procedures, and with CSR’s limits of authority.			

**Observation Verified By:**

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## QUESTION BANK/DISCUSSION

### UNIT STANDARD: 11815 - Answer customer enquiries on the telephone in a wide range of contexts

*Tick next to expected answer if that is what the candidate provides. Write the actual answer if it differs from the expected answer. NOTE: Expected answers are a guide only. The candidate can still be correct if their answer differs from the expected answer. Professional judgement should be exercised.*

PC	Question Guideline <i>(Phrase to suit your workplace)</i>	Expected Answer May Include	Actual Answer	Competency C/NYC
1.3	Identify the actions you would take to help out a stressful customer?	Check understanding. Calm the customer down by displaying QSS skills. Listen intently to the customer's needs so we can try and do things that can help them out. Go the extra step for them so they feel like some action is being done.		

PC	Question Guideline <i>(Phrase to suit your workplace)</i>	Expected Answer May Include	Actual Answer	Competency C/NYC
1.4	Identify the actions you would take to deal with Special Needs customers?	Speak slower and stay patient. May need to speak louder (especially if customer is deaf). Check understanding so you know exactly what the customer wants and confirm answers with them to confirm their understanding.		
1.5	Identify the communication processes you would take to deal with customers from minority cultural backgrounds?	Speak in simple English. Speak clearly and slowly. Check understanding before actioning request. Confirm steps as they are actioned so the customer understands everything that is going on.		

<b>PC</b>	<b>Question Guideline</b> <i>(Phrase to suit your workplace)</i>	<b>Expected Answer May Include</b>	<b>Actual Answer</b>	<b>Competency C/NYC</b>
3.3	Explain the process you would take if a customer enquires about something outside your immediate job responsibilities?	To meet workplace requirements.		