



NZQA Assessment Support Material – Learner Guidelines

Unit standard	56				
Title	Respond orally to customer enquiries				
Level	1	Credits	2	Version	9

Vocational pathways	Services Industries
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Guidelines to help achieve this standard

Unit standard 56, *Respond orally to customer enquiries*, is about communicating orally and responding to customer enquiries face-to face and on the phone.

A *customer* includes internal and external customers who you supply goods and/or services to.

While the unit standard does not actually require a services industries context, this resource is intended to be relevant to the services industries Vocational Pathway (VP).

The evidence for this activity could be collected from any context that involves interaction with customers. Evidence will be based on activities from your actual performance in a workplace (a place of paid or voluntary employment) or realistically simulated environment where customer contact is required.

AWARD OF CREDIT - ASSESSMENT EVIDENCE

This assessment requires you to show that you can respond orally to customer enquiries face-to-face and on the phone, in accordance with workplace requirements. Responding to is either dealing with the situation yourself or referring to another person.

The sorts of customer enquiries you attend to in the workplace might include requests for help, information or orders. *Customer* refers to both internal and external customers and refers to the recipient of goods and/or services.



This will include:

- Responding orally to customer enquiries in accordance with workplace requirements on **two (2) separate occasions in a face-to-face situation** (which can include communicating using electronic means e.g. Skype, FaceTime etc)
- Responding orally to customer enquiries in accordance with workplace requirements on **two (2) separate occasions by phone** (without visual contact)



For your assessment, you will need evidence of your performance. This could be through:

- a video of all of your performance or
- a video of part of your performance and/or direct verified observation (including the completed observation record sheet) by your workplace supervisor, tutor, and/or a qualified assessor.

Customer feedback may also be used as supplementary evidence.

CONDITIONS OF ASSESSMENT



Naturally occurring evidence may be collected from activities from your actual performance. In the absence of video evidence, a verifier's checklist is acceptable if accompanied by evidence that includes examples from your performance.



It is important the person who verifies your work must be someone in a supervisory role who works with you regularly. Asking your work or classmate to carry out the verifier role is not acceptable. The verifier must have the appropriate opportunity and responsibility to be able to observe you and confirm that you meet the required standards of performance.

The following pages can be used to record your performance.

OBSERVATION RECORD - Unit standard 56 version 9

To be completed by the Verifier, Supervisor or Assessor as they observe the learner's performance. What is observed must be specified and ticked off for each situation to confirm the actual performance.

Name:	Type of workplace: <i>e.g. travel agency, carpet cleaning company, café, beauty therapy spa</i>		Role: <i>e.g. travel agent, carpet cleaner, barista, trainee beauty therapist</i>	
The person being assessed has:				
1. Communicated orally in accordance with workplace requirements for each situation.	Date: Brief description of phone contact situation: Situation 1: Phone	Date: Brief description of phone contact situation: Situation 2: Phone	Date: Brief description of face-to-face contact situation: Situation 3: Face-to-face	Date: Brief description of face-to-face contact situation: Situation 4: Face-to-face
	Tick off actions as demonstrated			
	This could include but is not limited to meeting organisational requirements in terms of: <input type="checkbox"/> <i>Responding in a timely manner</i> <input type="checkbox"/> <i>Being polite</i> <input type="checkbox"/> <i>Giving an appropriate greeting/farewell</i> <input type="checkbox"/> <i>Using appropriate language</i> <input type="checkbox"/> <i>Listening and responding appropriately to customer needs</i> <input type="checkbox"/> <i>Other please specify</i>	This could include but is not limited to meeting organisational requirements in terms of: <input type="checkbox"/> <i>Responding in a timely manner</i> <input type="checkbox"/> <i>Being polite</i> <input type="checkbox"/> <i>Giving an appropriate greeting/farewell</i> <input type="checkbox"/> <i>Using appropriate language</i> <input type="checkbox"/> <i>Listening and responding appropriately to customer needs</i> <input type="checkbox"/> <i>Other please specify</i>	This could include but is not limited to meeting organisational requirements in terms of: <input type="checkbox"/> <i>Responding in a timely manner</i> <input type="checkbox"/> <i>Being polite</i> <input type="checkbox"/> <i>Giving an appropriate greeting/farewell</i> <input type="checkbox"/> <i>Using appropriate language</i> <input type="checkbox"/> <i>Listening and responding appropriately to customer needs</i> <input type="checkbox"/> <i>Other please specify</i>	This could include but is not limited to meeting organisational requirements in terms of: <input type="checkbox"/> <i>Responding in a timely manner</i> <input type="checkbox"/> <i>Being polite</i> <input type="checkbox"/> <i>Giving an appropriate greeting/farewell</i> <input type="checkbox"/> <i>Using appropriate language</i> <input type="checkbox"/> <i>Listening and responding appropriately to customer needs</i> <input type="checkbox"/> <i>Other please specify</i>

2. Responded orally to customer enquiries in accordance with workplace requirements for each situation.	Date:	Date:	Date:	Date:
	Brief description of phone enquiry:	Brief description of phone enquiry:	Brief description of face-to-face enquiry:	Brief description of face-to-face enquiry:
	Situation 1: Phone	Situation 2: Phone	Situation 3: Face-to-face	Situation 4: Face-to-face
Tick off actions as demonstrated				
	This could include but is not limited to meeting organisational requirements in terms of: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Asking relevant open and closed questions to clarify the nature of the enquiry</i> <input type="checkbox"/> <i>Restating information to check understanding and accuracy</i> <input type="checkbox"/> <i>Giving accurate information to help resolve or progress the enquiry</i> <input type="checkbox"/> <i>Passing on clear messages</i> <input type="checkbox"/> <i>Ending phone interaction appropriately</i> <input type="checkbox"/> <i>Other please specify</i> 	This could include but is not limited to meeting organisational requirements in terms of: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Asking relevant open and closed questions to clarify the nature of the enquiry</i> <input type="checkbox"/> <i>Restating information to check understanding and accuracy</i> <input type="checkbox"/> <i>Giving accurate information to help resolve or progress the enquiry</i> <input type="checkbox"/> <i>Passing on clear messages</i> <input type="checkbox"/> <i>Ending phone interaction appropriately</i> <input type="checkbox"/> <i>Other please specify</i> 	This could include but is not limited to meeting organisational requirements in terms of: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Asking relevant open and closed questions to clarify the nature of the enquiry</i> <input type="checkbox"/> <i>Restating information to check understanding and accuracy</i> <input type="checkbox"/> <i>Giving accurate information to help resolve or progress the enquiry</i> <input type="checkbox"/> <i>Passing on clear messages</i> <input type="checkbox"/> <i>Ending face to face interaction appropriately</i> <input type="checkbox"/> <i>Other please specify</i> 	This could include but is not limited to meeting organisational requirements in terms of: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Asking relevant open and closed questions to clarify the nature of the enquiry</i> <input type="checkbox"/> <i>Restating information to check understanding and accuracy</i> <input type="checkbox"/> <i>Giving accurate information to help resolve or progress the enquiry</i> <input type="checkbox"/> <i>Passing on clear messages</i> <input type="checkbox"/> <i>Ending face to face interaction appropriately</i> <input type="checkbox"/> <i>Other please specify</i>
When this form is completed and signed, it confirms that the person being assessed carried out all forms of oral communication by phone and in face-to-face situations when responding to customer enquiries in a workplace (or equivalent simulated conditions) according to workplace requirements, and that they could continue to perform in this way.				
Verifier/Supervisor/Assessor's signature:				
Name:			Position/Workplace:	
Date:				