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Letter to Candidate,
and
Assessment Plan

DATE: _____

NAME AND ADDRESS:

Dear _____

ASSESSMENT:

I hereby confirm your forthcoming assessment on the outcomes of the following registered unit standard:

***Providing Customer Service
NQF Level 4
16 Credits***

The assessment will take place on:

- Date:** As per rollout plan
- Time:** As per rollout plan
- Venue:** As per rollout plan
- Language:** English, except if requested in another language
- Special Needs:** None, except if made known

Assessment Methods to be utilised

1. Knowledge test
2. Portfolio of Evidence

Assessment Criteria to be used:

- Describe organisational policy on customer service for retail/wholesale outlet
- Describe organisational procedures for handling customer complaints/queries
- Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets
- Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints
- Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet

You will need to prepare yourself in the following ways

- Prepare all material, equipment and other logistics for the process observation
- Familiarise yourself with the store's typical customer profile and the way its client base is built
- Familiarise yourself with the full range of merchandise kept by your store
- Familiarise yourself with your store's report writing hardware and software
- Identify internal and external complaints resolution channels
- Make contact with your assessor to discuss the schedule and process for your assessments.

You will need to bring the following items with you

- A working black pen (and a spare!)
- Pencil and ruler
- All materials, equipment and other logistics for the process observation
- The results of any formative assessments, where available, which might assist the assessor to make appropriate decisions about your level of competence.

You are invited to provide me with any extra evidence to support your competencies, such as your CV, letters of recommendation from your supervisor or any other evidence that will support your competence.

You are expected to be prompt. Should you not be clear as to what is expected from you, you may ask questions during the assessment. I will assess you as the candidate, however you may bring along a third party to observe the assessment process should you wish. The observer will have no responsibilities relating to the assessment process and may not take part in the assessment.

There will be a process of moderation to ensure that the assessment was fair, valid and reliable.

If you are found “not yet competent” you may appeal to the internal moderator. This must be based on one or more of the following:

- Unfair assessments
- Invalid assessments
- Unreliable assessments
- The assessor’s judgement, if considered biased
- Inadequate expertise and experience of the assessor if it influenced the assessment
- Unethical practices

Every candidate will be allowed two re-assessments after initial assessment, if declared “not yet competent”.

If you have any questions relating to the above, please do not hesitate to contact me on telephone number: _____.

Yours sincerely

ASSESSOR : NAME

ASSESSOR: SIGNATURE

NAME OF LEAD PROVIDER: _____

Assessment plan

DATE:	
TIME:	
ASSESSOR:	
CANDIDATE:	
ID NUMBER:	
ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
E-MAIL:	
OCCUPATIONAL QUALIFICATION (TO BE ASSESSED)	
UNIT STANDARDS (TO BE ASSESSED)	Providing customer service (NQF 4)
EMPLOYMENT ORGANISATION	
DEPARTMENT	
CONTACT PERSON	
TELEPHONE NUMBER	
SPECIAL ARRANGEMENTS:	

ASSESSMENT AGREEMENT

We, the undersigned, agree that the above information is correct and that the said assessment/s will take place at the agreed time, date and place.

SIGNED:

ASSESSOR

CANDIDATE

Assessment plan

DATE:	
TIME:	
ASSESSOR:	
CANDIDATE:	
ID NUMBER:	
ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
E-MAIL:	
OCCUPATIONAL QUALIFICATION (TO BE ASSESSED)	
UNIT STANDARDS (TO BE ASSESSED)	Providing customer service (NQF 4)
EMPLOYMENT ORGANISATION	
DEPARTMENT	
CONTACT PERSON	
TELEPHONE NUMBER	
SPECIAL ARRANGEMENTS:	

ASSESSMENT AGREEMENT

We, the undersigned, agree that the above information is correct and that the said assessment/s will take place at the agreed time, date and place.

SIGNED:

ASSESSOR

CANDIDATE

Assessment Plan

<u>Title:</u>	Providing customer service
<u>Description:</u>	A comprehensive assessment of the salesperson's ability to increase customer satisfaction by improving the way that customer complaints are dealt with and includes simulated customer interventions, practical process assessments and knowledge based assessments.
<u>Outcomes:</u>	<p><i>Specific outcomes:</i> The demonstrated ability to make decisions and consider options when:</p> <ul style="list-style-type: none"> • Responding to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets • Recording telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail/wholesale outlets • Negotiating with internal and external resources for providing effective solutions to customer queries/complaints in retail/wholesale outlets • Identifying and alerting co-workers to short-falls in product and services in retail/wholesale outlets • Updating and maintaining customer information using a range of data capturing processes for recording customer details in retail/wholesale outlets <p><i>Embedded knowledge:</i> The demonstrated understanding of:</p> <ul style="list-style-type: none"> • Verbal communication and negotiating techniques for dealing with internal and external customers • Organisational procedures/processes for recording and dealing with customer complaint/query details • Knowledge of ranges of merchandise, pricing structures and delivery procedures for merchandise stocked by associated retail/wholesale outlets • Organisational structure and internal/external resources/communication channels for resolving customer queries/complaints <p><i>Critical cross field outcomes:</i> The ability to:</p> <ul style="list-style-type: none"> • Organise oneself and one's activities when resolving complaints so that internal stress is controlled when handling customer conflict situations • Collect and critically evaluate information when responding to telephonic queries and complaints so that appropriate solutions are offered to dissatisfied customers. • Communicate effectively when negotiating with internal and external resources so that customer requirements are clearly understood and effective actions are initiated to resolve customer dissatisfaction. • Work with others as a team when informing co-workers of shortfalls in product and service delivery so that all co-workers are committed towards rectifying customer dissatisfaction. • Use science and technology effectively so that customer information is accurately recorded and regularly updated. • Understand the world as a set of related systems where a clear understanding of customer expectations leads to providing the correct solutions to resolving customer dissatisfaction
<u>Assessment:</u>	<p>The ability to produce the following types of evidence:</p> <ul style="list-style-type: none"> • Describe organisational policy on customer service for retail/wholesale outlet

	<ul style="list-style-type: none"> • Describe organisational procedures for handling customer complaints/queries • Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets • Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints • Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet
<u>Range:</u>	<ul style="list-style-type: none"> • Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet • A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems
<u>Instruments:</u>	<ol style="list-style-type: none"> 1. Knowledge test 2. Portfolio of evidence
<u>Period of assessment:</u>	The knowledge test will take 60 minutes.
<u>Location:</u>	The knowledge test will take place and the portfolio of evidence needs to be submitted, as per the rollout plan.
<u>Credits:</u>	This assessment is worth 16 SAQA credits indicating a notional learning time of 160 hours.
<u>Steps of assessment</u>	<ol style="list-style-type: none"> 1. Knowledge test 2. Portfolio of evidence
<u>Level</u>	The level of customer service skills is pegged at NQF 4, equivalent to grade 12 (Matric) in the schooling system or a technician level in the technical training system.
<u>Results</u>	Results and feedback will be given within 14 days of assessment
<u>Policy and appeals:</u>	This assessment, including the recording of results and any possible appeal to these, is governed by _____ official assessment policy. Appeals should be dealt with according with _____ policies and procedures.

Appendix A

PLANNING ASSESSMENT

METHODS	Knowledge test	Portfolio of Evidence
PERIOD	As per rollout plan	As per rollout plan
PEOPLE	ASSESSOR	ASSESSOR
FACILITIES/ LOCATION	As per rollout plan	As per rollout plan
EQUIPMENT/ MATERIALS	Table, chair, black pen	Computer with necessary software, black pen

PROVIDING CUSTOMER SERVICE NQF 4
INSTRUCTIONS TO LEARNER TO COMPILE A
PORTFOLIO OF EVIDENCE

Specific Outcomes	Assessment Criteria	Type of Evidence Required
<p>1. Responding to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe organisational policy on customer service for retail/wholesale outlet • Describe organisational procedures for handling customer complaints/queries • Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets • Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints • Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet • Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, 	<ol style="list-style-type: none"> 1. Provide a list of the possible solutions to customer complaints in your organisation 2. Provide a flow diagram that shows the steps to be taken when receiving and resolving a customer complaint 3. Provide a copy of your organisation's Policy or philosophy in respect of customer complaints <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>

	<p>discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet</p> <ul style="list-style-type: none"> • A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems 	
<p>2. Recording telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe organisational policy on customer service for retail/wholesale outlet • Describe organisational procedures for handling customer complaints/queries • Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets • Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints • Demonstrate techniques for alerting co-workers to short-falls in product and service 	<p>1. An authenticated observation of you handling a telephonic query or complaint from a dissatisfied customer, including future actions to be taken to resolve the complaint/query</p> <p>Note: The best evidence would be a letter from a satisfied customer.</p> <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>

	<p>delivery retail/wholesale outlet</p> <ul style="list-style-type: none"> • Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet • A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems 	
<p>3 Negotiating with internal and external resources for providing effective solutions to customer queries/complaints in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe organisational policy on customer service for retail/wholesale outlet • Describe organisational procedures for handling customer complaints/queries • Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets • Demonstrate techniques for providing customer 	<p>1. List the internal and external resources that are available for handling customer complaints and queries. Identify each resource and the assistance available from that source. Provide one example of when the resource was useful in resolving a customer query or complaint</p> <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>

	<p>service using internal and external communication channels to resolve customer queries/complaints</p> <ul style="list-style-type: none"> • Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet • Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet • A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems 	
<p>4. Identifying and alerting co-workers to short-falls in products and services in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe organisational policy on customer service for retail/wholesale outlet • Describe organisational procedures for handling customer complaints/queries 	<ol style="list-style-type: none"> 1. Prepare and provide an outline of a talk you will give to your co-workers about a specific breakdown in the customer service chain 2. Give the talk, and provide feedback from

	<ul style="list-style-type: none"> • Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets • Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints • Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet • Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet • A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing 	<p>your fellow workers on how well you did and whether they feel the breakdown will be corrected</p> <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>
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	systems	
<p>5. Updating and maintaining customer information using a range of data capturing processes for recording customer details in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe organisational policy on customer service for retail/wholesale outlet • Describe organisational procedures for handling customer complaints/queries • Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets • Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints • Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet • Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an 	<ol style="list-style-type: none"> 1. Collect information for customer updating a customer record relating to – <ul style="list-style-type: none"> • Physical address • Contact details • Current status of account • Purchasing profile • Specific preferences 2. Check completeness and accuracy of information. 3. Process information using store specific data capture system (manual / electronic). 4. Perform range of functions with data, including – <ul style="list-style-type: none"> • Manipulation • Updating • Deleting 5. Compile reports based on customer data. 6. Develop plan for future action to resolve customer dissatisfaction. 7. File customer data. <p>Note: The above should be authenticated as the result of an actual phone call. If this is not possible, then it should reflect the result of a realistic role play between yourself and another person (acting as customer)</p> <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>

	<p>associated retail/wholesale outlet</p> <ul style="list-style-type: none">• A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems	
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Candidate's
Curriculum
Vitae

Indirect Evidence

Indirect evidence is evidence produced about the learner from another source. This is usually in the form of reports of third party sources, i.e. sources other than the assessor. Indirect evidence can be used to verify the authenticity of other forms of evidence. In addition, it may be necessary to corroborate these forms of evidence. Sources of indirect evidence include:

- Team outputs
- Work completed at an earlier stage
- Performance appraisals
- Training records
- Testimonials
- Reviews and commendations
- Certificates and qualifications
- Medals, prizes and trophies
- Customer/client ratings

NB: Please include a copy of your Identity Document at the beginning of this section.

Relevant
Unit
Standard

Providing Customer Service

Unit standard number	RW/C/SERVE/4
Unit standard level	NQF 4
Credit value	16
Field	Services
Sub-field	Retail and Wholesale
Issue date	1 June 1999
Review date	31 May 2001

Purpose and relationship to qualification

- This unit is a core standard towards the qualification National Certificate in Retail/Wholesale Sales and Services at NQF 4. It is aimed at raising the level of customer satisfaction to world class levels by transforming the way customer complaints are dealt with in South African retail/wholesale outlets.

Learning assumed to be in place

- English communication at NQF 3 equivalent
- Computer literacy in terms of basic database and spreadsheet programmes

Specific Outcomes

The demonstrated ability to make decisions and consider options when:

- Responding to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets
- Recording telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail/wholesale outlets
- Negotiating with internal and external resources for providing effective solutions to customer queries/complaints in retail/wholesale outlets
- Identifying and alerting co-workers to shortfalls in products and services in retail/wholesale outlets
- Updating and maintaining customer information using a range of data capturing processes for recording customer details in retail/wholesale outlets

Assessment Criteria

The ability to produce all of the following types of evidence:

- Describe organizational policy on customer service for retail/wholesale outlet
- Describe organizational procedures for handling customer complaints/ queries
- Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets
- Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/ complaints
- Demonstrate techniques for alerting co-workers to shortfalls in product and service delivery retail/wholesale outlet

(The evidence must be judged by a registered retail assessor both in-store and at the training centre)

Range Statement

- Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet
- A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems

Notes (1) : Embedded Knowledge

The demonstrated understanding of:

- Verbal communication and negotiating techniques for dealing with internal and external customers
- Organizational procedures/processes for recording and dealing with customer complaint/query details
- Knowledge of ranges of merchandise, pricing structures and delivery procedures for merchandise stocked by associated retail/wholesale outlets
- Organizational structure and internal/external resources/ communication channels for resolving customer queries/complaints

Notes (1) : Critical Cross Field and Development Outcomes

The ability to:

- Organise oneself and one's activities when resolving complaints so that internal stress is controlled when handling customer conflict situations
- Collect and critically evaluate information when responding to telephonic queries and complaints so that appropriate solutions are offered to dissatisfied customers
- Communicate effectively when negotiating with internal and external resources so that customer requirements are clearly understood and effective actions are initiated to resolve customer dissatisfaction
- Work with others as a team when informing co-workers of shortfalls in product and service delivery so that all co-workers are committed towards rectifying customer dissatisfaction
- Use science and technology effectively so that customer information is accurately recorded and regularly updated
- Understanding the world as a set of related systems where a clear understanding of customer expectations leads to providing the correct solutions to resolving customer dissatisfaction

“Providing Customer Service”

Evidence of Outcome 1

“Responding to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets”

Your evidence must show:

1. Provide a list of the possible solutions to customer complaints in your organisation
2. Provide a flow diagram that shows the steps to be taken when receiving and resolving a customer complaint
3. Provide a copy of your organisation's Policy or philosophy in respect of customer complaints

“Providing Customer Service”

Evidence of Outcome 2

“Recording telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail/ wholesale outlets”

Your evidence must show:

1. An authenticated observation of you handling a telephonic query or complaint from a dissatisfied customer, including future actions to be taken to resolve the complaint/query

Note: The best evidence would be a letter from a satisfied customer.

“Providing Customer Service”

Evidence of Outcome 3

“Negotiating with internal and external resources for providing effective solutions to customer queries/complaints in retail/wholesale outlets”

Your evidence must show:

1. List the internal and external resources that are available for handling customer complaints and queries. Identify each resource and the assistance available from that source. Provide one example of when the resource was useful in resolving a customer query or complaint

“Providing Customer Service”

Evidence of Outcome 4

“Identifying and alerting co-workers to shortfalls in products and services in retail/wholesale outlets”

- 1) Your evidence must show:
- 2) Prepare and provide an outline of a talk
- 3) you will give to your co-workers about a specific breakdown in the customer service chain
- 4) Give the talk, and provide feedback from
- 5) your fellow workers on how well you did and whether they feel the breakdown will be corrected

“Providing Customer Service”

Evidence of Outcome 5

“Updating and maintaining customer information using a range of data capturing processes for recording customer details in retail/wholesale outlets”

- 1) Your evidence must show:
- 2) Collect information for customer updating a customer record relating to –
 - a. Physical address
 - b. Contact details
 - c. Current status of account
 - d. Purchasing profile
 - e. Specific preferences
- 3) Check completeness and accuracy of information.
- 4) Process information using store specific data capture system (manual / electronic).
- 5) Perform range of functions with data, including –
 - a. Manipulation
 - b. Updating
 - c. Deleting
- 6) Compile reports based on customer data.
- 7) Develop plan for future action to resolve customer dissatisfaction.
- 8) File customer data.
- 9) **Note:** The above should be authenticated as the result of an actual phone call. If this is not possible, then it should reflect the result of a realistic role play between yourself and another person (acting as customer)

Assessment Evaluation
and
Moderation Report

EVALUATION REPORT

UNIT STANDARD NAME: PROVIDING CUSTOMER SERVICE
UNIT STANDARD NUMBER: RW/C/SERVE/4
UNIT STANDARD LEVEL: 4
CREDITS: 16
FIELD: SERVICES
SUB-FIELD: RETAIL AND WHOLESALE
ISSUE DATE: 1 JUNE 1999
REVIEW DATE: 31 MAY 2001

LEARNER'S FULL NAMES: _____

CONTACT NUMBER: _____

ASSESSOR'S NAME: _____

DATE OF ASSESSMENT: _____

ASSESSMENT METHODOLOGY: _____

LEARNER'S COMPANY: _____

LEARNER MODERATOR DEPT: _____

ID NUMBER OF LEARNER: _____

MODERATOR'S NAME: _____

DATE OF MODERATION: _____

ASSESSOR

MODERATOR

EVIDENCE OF LEARNING SHOULD BE IN PLACE (WHAT SHOULD THE CANDIDATE KNOW AND BE ABLE TO DO BEFORE STARTING THE UNIT STANDARD)

CRITERIA	ASSESSMENT RESULTS
<ul style="list-style-type: none"> • English communication at NQF 3 equivalent. • Computer literacy in terms of basic database and spreadsheet programmes. 	

FEEDBACK: _____

RANGE STATEMENT:

- Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet
- A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems

UNIT STANDARD : PROVIDING CUSTOMER SERVICE NQF 4

	ASSESSMENT CRITERIA	COMPETENT
1	<p>Responding to customer queries and complaints by offering a range of solutions for resolving customer dissatisfaction in retail/wholesale outlets</p> <p><i>Evidence must show:</i></p>	
	1.1 Describe organisational policy on customer service for retail/wholesale outlet	
	1.2 Describe organisational procedures for handling customer complaints/queries	
	1.3 Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets	
	1.4 Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints	
	1.5 Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet	
	1.6 Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet	
	1.7 A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems	
2	<p>Recording telephonic queries and complaints to initiate future actions for customer dissatisfaction in retail/wholesale outlets</p> <p><i>Evidence must show:</i></p>	
	2.1 Describe organisational policy on customer service for retail/wholesale outlet	
	2.2 Describe organisational procedures for handling customer complaints/queries	

	2.3 Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets	
	2.4 Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints	
	2.5 Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet	
	2.6 Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet	
	2.7 A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems	
3	<p>Negotiating with internal and external resources for providing effective solutions to customer queries/complaints in retail/wholesale outlets</p> <p><i>Evidence must show:</i></p>	
	3.1 Describe organisational policy on customer service for retail/wholesale outlet	
	3.2 Describe organisational procedures for handling customer complaints/queries	
	3.3 Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets	
	3.4 Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints	
	3.5 Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet	
	3.6 Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet	
	3.7 A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems	
4	<p>Identifying and alerting co-workers to short-falls in products and services in retail/wholesale outlets</p> <p><i>Evidence must show:</i></p>	
	4.1 Describe organisational policy on customer service for retail/wholesale outlet	
	4.2 Describe organisational procedures for handling customer complaints/queries	
	4.3 Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets	
	4.4 Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints	
	4.5 Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet	
	4.6 Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet	
	4.7 A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems	

5	Updating and maintaining customer information using a range of data capturing processes for recording customer details in retail/wholesale outlets <i>Evidence must show:</i>	
	5.1 Describe organisational policy on customer service for retail/wholesale outlet	
	5.2 Describe organisational procedures for handling customer complaints/queries	
	5.3 Demonstrate techniques for updating and maintaining customer information records in retail/wholesale outlets	
	5.4 Demonstrate techniques for providing customer service using internal and external communication channels to resolve customer queries/complaints	
	5.5 Demonstrate techniques for alerting co-workers to short-falls in product and service delivery retail/wholesale outlet	
	5.6 Solutions for resolving customer dissatisfaction including offering merchandise replacements, money-back guarantees, discounted prices, alternative ranges of similar merchandise, no-cost repairs, merchandise replacement at an associated retail/wholesale outlet	
	5.7 A range of data capturing processes for recording customer details in retail/wholesale outlets including manual/electronic data capturing systems	

FEEDBACK: _____

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

ASSESSMENT OF THE ABILITY TO USE RELEVANT CRITICAL CROSS-FIELD OUTCOMES

	ASSESSMENT CRITERIA	COMPETENT
1	Organise oneself and one's activities when resolving complaints so that internal stress is controlled when handling customer conflict situations	
2	Collect and critically evaluate information when responding to telephonic queries and complaints so that appropriate solutions are offered to dissatisfied customers	
3	Communicate effectively when negotiating with internal and external resources so that customer requirements are clearly understood and effective actions are initiated to resolve customer dissatisfaction	
4	Work with others as a team when informing co-workers of shortfalls in product and service delivery so that all co-workers are committed towards rectifying customer dissatisfaction	
5	Use science and technology effectively so that customer information is accurately recorded and regularly updated	
6	Understanding the world as a set of related systems where a clear understanding of customer expectations leads to providing the correct solutions to resolving customer dissatisfaction	

FEEDBACK: _____

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

EVIDENCE OF ESSENTIAL EMBEDDED KNOWLEDGE

KNOWLEDGE COMPONENT	EVIDENT IN SUBMISSION
Verbal communication and negotiating techniques for dealing with internal and external customers	
Organizational procedures/processes for recording and dealing with customer complaint/query details	
Knowledge of ranges of merchandise, pricing structures and delivery procedures for merchandise stocked by associated retail/wholesale outlets	
Organizational structure and internal/external resources/ communication channels for resolving customer queries/complaints	

FEEDBACK: _____

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

SUPPLEMENTARY INFORMATION

Was the assessment conducted true to all the principles of assessment stated before?

1.	Appropriate	The method of assessment is suited to the performance being assessed.
2.	Fair	The method of assessment does not present any barriers to achievements related to the evidence.
3.	Manageable	The methods used make for easily arranged, cost effective assessments.
4.	Integrated	Evidence collection is integrated into the work or learning process where this is appropriate and feasible.
5.	Valid	The assessment focuses on the requirements laid down in the Standard i.e. is fit for purpose.
6.	Direct	The activities in the assessment mirror the conditions of actual performance as closely as possible.
7.	Authentic	The assessor is satisfied that the work being assessed is attributable to the person being assessed.
8.	Sufficient	The evidence establishes that all criteria are met and that performance can be repeated consistently
9.	Systematic	Planning and recording is sufficiently rigorous to ensure that assessment is fair.
10.	Open	Learners can contribute to the planning and accumulation of evidence. Assessment candidates understand the assessment process and the criteria that is applicable.
11.	Consistent	The same assessor would make the same judgment again in similar circumstances. The judgment made is similar to the judgment that would be made by other assessors.

If no, state how the neglected principle can be achieved in future.

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

ASSESSMENT REPORT

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

FEEDBACK FROM LEARNER

		YES	NO
1	Was the assessment process made clear to you before assessment started?		
2	Did the assessor or representative explain what would be expected from you according to the unit standard?		
3	Was the assessment done in a fair and equitable way?		
4	If any of the above questions were answered NO, please note your concerns below.		
	CONCERNS:		

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____