|  |  |
| --- | --- |
| **Unit Standard ID: 10052**  **10054**  **10066**  **10047** | **Unit Standard Title:**  **Monitor handling of customers by frontline customer service**  **Identify and manage areas of customer service impact**  **Manage customer relations**  **Close the deal** |

**Learner PoE Workbook**

**Customer Service**

# Portfolio of Evidence

|  |  |
| --- | --- |
| Learner name and surname |  |
| Learner ID number or alternative ID |  |
| Learner telephone number |  |
| Date of submission |  |
| Return address for the Portfolio of Evidence |  |
| Manager or Supervisor’s Name |  |
| Contact details |  |
| Special needs |  |

*I hereby declare that the assessment process as contained in this guide was discussed with me and that I agree to be assessed on these principles*

**Learner Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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

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# Learner Orientation

This learning programme is based on the following unit standards - **See unit standard guide**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 10052 | Monitor handling of customers by frontline customer service | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Marketing | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Marketing | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **OLD NQF LEVEL** | **NEW NQF LEVEL** | **CREDITS** |
| Undefined | Regular | Level 5 | New Level Assignment Pend. | 6 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 10054 | Identify and manage areas of customer service impact | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Marketing | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Marketing | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular | Level 5 | New Level Assignment Pend. | 6 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 10105/14 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 10066 | Establish customer needs and relationships | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Marketing | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Marketing | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular | Level 5 | New Level Assignment Pend. | 16 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018-07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 10047 | Close a deal with a customer | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Marketing | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Marketing | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular | Level 5 | New Level Assignment Pend. | 5 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2018 - 07-01 | 2023-06-30 | SAQA 06120/18 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2024-06-30 | | 2027-06-30 | | |

# Assessment Overview

## Assessment Instruments

### Formative Assessment

The Formative Assessment consists of assessments at the end of each chapter in the Learner POE Workbook for you to complete and submit as part of your Portfolio of Evidence. These activities have been designed around the specific outcomes of your unit standards and will assist in showing areas where you may need more help, as well as where your strengths are. Upon completion of these tests, submit them as your Formative Assessment.

### Summative Assessment

The Summative assessment is the assignment and or project to be completed after the contact session and is attached to this page. The Summative assessment must often be completed in consultation with your Line Manager / Coach. You may also consult with work colleagues. This is not “cheating” and it is the responsibility of the line-manager or coach to ensure that the project you have tackled is realistic and that the assignment adds value to yourself (in terms of your learning) and to the organisation.

Please note that the questions asked in the Summative assessment may not deal DIRECTLY with the outcomes listed in the unit standards linked to the assignment. It is your responsibility, as you complete the assignment, and the formative assessment, to ensure that you provide the assessor with sufficient evidence of competence against ALL the outcomes of the programme provided.

The recommended process of learning and applying your learning is as follows:

1. Workshop/ Contact time: Deepen your knowledge in the subject area and explore how the theories, concepts and ideas apply to your role within the organisation. Ask questions and share ideas with other learners.
2. Formative Assessment: Upon completion of the workshop, complete and collate all the activities, case studies and exercises that were covered during the workshop (including additional ones provided by the facilitator)*.*
3. Summative Assessment: Draft an outline of the assignment answer; check it against the unit standard outcomes and assessor guidelines. Ensure that all the outcomes have been covered in your assignment and/or the formative assessment. Now complete the final draft of your assignment.

# Portfolio of Evidence

Your portfolio of evidence is the combination of the Formative and Summative assessment. It is critical that you keep a copy of the whole portfolio as the assessor’s comments will refer to specific page numbers of the portfolio.

## Instructions to the Learner:

1. This Learner POE Workbook is designed to assist you in compiling your Portfolio of Evidence.
2. Learners must comply with the following Code of Conduct during facilitation sessions:

* Learners will abide by the time frames for training as contracted with them by the facilitator/assessor.
* Learners will sign the attendance register on each day of training.
* Learners must complete the **Learner Registration Form** and evaluate the training after completion on the **Learner Feedback Form**.
* Learners that are assessed to obtain credits towards a qualification, have to sign the assessment contract and have to complete all assessments as instructed by the assessor.
* If a learner cannot attend the training/assessment opportunity, the reasons for his absence must be registered with the responsible person(s) of the contracted client.
* Learners will treat each other and the facilitator with respect during the training/assessment opportunity.
* Learners must ensure that cell phones must be switched off during training.

1. Ensure that you initial every page of your Portfolio of Evidence in the space provided on the bottom of each page. This is important to ensure authenticity.
2. Learner must sign all documents required in sections A and D.
3. ALL formative and summative activities must be completed in order to be deemed competent against the unit standard.
4. The declaration of Authenticity form MUST be signed and if evidence was collected in group activities, it should be declared on this form.
5. The learner must take note that he/she will have three assessment opportunities to show competence against the outcomes of the unit standard.
6. The learner must make himself aware of the Re-assessment and Appeals Procedure.

# Section A

# CV and CERTIFIED COPY OF ID of Learner

Complete the CV below or attach a copy of your own CV.

|  |  |
| --- | --- |
| **NAME AND SURNAME** |  |
| **HIGHEST SCHOOL QUALIFICATION** |  |
| **OTHER QUALIFICATIONS** |  |
| **POSITION IN ORGANISATION** |  |
| **HOW LONG HAVE YOU BEEN IN THIS POSITION** |  |
| **GIVE A BRIEF DESCRIPTION OF YOUR WORK EXPERIENCE:** | |
| **SIGNATURE** |  |

# Assessment Information

## Assessment Details

|  |  |
| --- | --- |
| **LEARNER INFORMATION** | |
| Name |  |
| Identity number |  |
| Telephone no |  |
| E-mail address |  |
| Postal address |  |
| **ASSESSOR INFORMATION** | |
| Name |  |
| Identity number |  |
| Telephone no |  |
| E-mail address |  |
| **MODERATOR INFORMATION** | |
| Name |  |
| Identity number |  |
| Telephone no |  |
| E-mail address |  |

# Declaration of Authenticity

I, ............................................................................. (Full names of learner), declare that the contents of this portfolio are entirely my own original work. I understand that any evidence I submit needs to be my own product and if evidence were found to be fake or a duplicate of another learner’s work, I may forfeit the opportunity to be assessed.

# The following are items or documents that are not entirely my own original work.

|  |  |
| --- | --- |
| **Name of Document** | **Page nr/Section in Portfolio** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

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

**Signature of learner Date**

# Declaration

Please complete the following declaration and Critical Cross-field checklist and ask your supervisor or mentor to also complete the list below

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **I hereby declare that the work submitted in the Portfolio of Evidence** | | | **Self- Assessment** | | **Supervisor/ Mentor** |
| Is the Learner’s own work (authentic)? | | |  | |  |
| Is a reflection of the learner’s current competencies? | | |  | |  |
| **Would you rate the learner as competent in the following Critical Cross-field Outcomes?** | | |  | |  |
| The learner has shown the ability to Identify and solve problems | | |  | |  |
| The learner has shown the ability to Organise and manage himself or herself and his/her activities responsibly and effectively. | | |  | |  |
| The learner has shown the ability to Collect, organise and critically evaluate information. | | |  | |  |
| The learner has shown the ability to Communicate effectively using visual, mathematical and language skills. | | |  | |  |
| The learner has shown the ability to Demonstrate an understanding of the world as a set of related systems. | | |  | |  |
| The learner has shown the ability to act culturally and aesthetically sensitive across a range of social contexts. | | |  | |  |
| The learner has shown the ability to use Science and technology effectively and critically. | | |  | |  |
| The learner has shown the ability to Work effectively with others as a member of a team, group, organisation and community. | | |  | |  |
| **Learner signature** |  | **Date** | |  | |
| **Mentor/Supervisor signature** |  | **Date** | |  | |

# Pre-Assessment Meeting Checklist

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Learner**  **name** |  | **Unit Standard Number** | 10052; 10066; 10054; 10047 | **Credits** | 33 |
| **Assessor**  **name** |  | **Unit Standard Title** | Customer service | **Level** | 5 |
| **Moderator** |  | | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Nr** | **Points to be Covered** | | **** |
| 1 | Welcome the Learner and put them at ease. | |  |
| 2 | Explain the purpose and objectives of the meeting. | |  |
| 3 | Provide clear explanations of the key elements and implications of standards-based assessments within the context of the NQF. | |  |
| 4 | Explain the assessment process and the principles of good assessment practice. | |  |
| 5 | Explain the roles and responsibilities of the Learner, assessors and moderators. | |  |
| 6 | Explain the Learner’s rights; discuss the appeal process and reassessment policies. | |  |
| 7 | Provide Learner with a copy of the relevant unit standard and criteria against which they will be assessed. | |  |
| 8 | Discuss and identify any special assessments needs of the Learner. | |  |
| 9 | Identify and eliminate any unfair barriers e.g. language, disabilities. | |  |
| 10 | Discuss the evidence requirements with the Learner and agree on evidence the Learner must submit. | |  |
| 11 | Explain and agree the best assessment methods, instruments and activities to be used. | |  |
| 12 | Ensure the assessment environment and activities are aligned with recognized codes of practice, health and safety procedures and standards operating procedures | |  |
| 13 | Agree on an assessment schedule with the Learner, which reflects assessment criteria, types of evidence to be collected, assessment methods, timing of assessments, sequence of activities, deadlines and arrangements for reviewing the assessment plan. | |  |
| 14 | Discuss the importance of confidentiality of all information. | |  |
| 15 | Discuss the moderation and certification process. | |  |
| 16 | Give the Learner opportunity to seek clarification on any items discussed. | |  |
| 17 | Provide the Learner with a copy of the assessment contract which is signed and safely stored away. | |  |
| 18 | Explain how the learner will be supported during the assessment process. | |
| **Declaration of understanding** | | | |
| I am ready to be assessed. | | |  |
| I declare that the points of the Pre-Assessment Meeting Checklist were explained by the assessor. | | |  |
| I declare that I have received copies of the Unit standards, assessment plan/schedule and copies of the relevant policies and procedures pertaining to my assessment. | | |  |
| **ASSESSOR’S SIGNATURE** | | **DATE** | |
| **LEARNER’S SIGNATURE** | | **DATE** | |

# Learner Assessment Contract

|  |  |
| --- | --- |
| Learner name: |  |
| Assessor name: |  |
| Unit standard assessed: | 10052; 10054; 10066; 10047 |
| Date: |  |
| **Your rights as a learner:**   * You have the right to appeal against any judgement given as a result of any assessment. You must have a valid reason for doing this. * You have the right to an interpreter if you need one to perform this function. However, if one of the learning assumptions for the standard is that you are competent within the language of assessment you may not have an interpreter. * You can ask that an impartial observer attend any assessment. This observer may not take part in the assessment. * If you do not agree with the assessment you have the right to have your assessment internally moderated. If you still do not agree with the result of the assessment you can ask that the ETQA perform an external moderation on the assessment. If any verification upholds the assessment findings you will be held liable for all costs of the verification. If any verification rules that you have been aggrieved as a result of the assessment, your assessor will be liable for all cost of verification. * If you are found NOT YET COMPETENT, your assessor will encourage you to master the areas where you have not reached competency. You are required to arrange a new assessment date with the assessor. The assessor can only permit two re-assessments. If you as the learner have not reached competence after the three assessment attempts, your assessor may remove you from the programme and will direct you towards another learning path. | |
| **Confidentiality**  Each assessment application, the outcomes, results and reviews will be treated as a confidential matter by learners, assessors and moderators. No references will be made to anyone or any organisation outside the SETA about the status of an application during the assessment process. | |

|  |
| --- |
| **Consent**  I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, the learner, hereby state that I have read the above and understood the content thereof. I was given the opportunity to clarify any issues relating to the assessment process and my assessment plan.  Learner signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Assessor signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

# Section B -Formative Assessments

# 1A - Individual Formative Exercise

# Ritz Carlton Hotel Case Study

## Instructions:

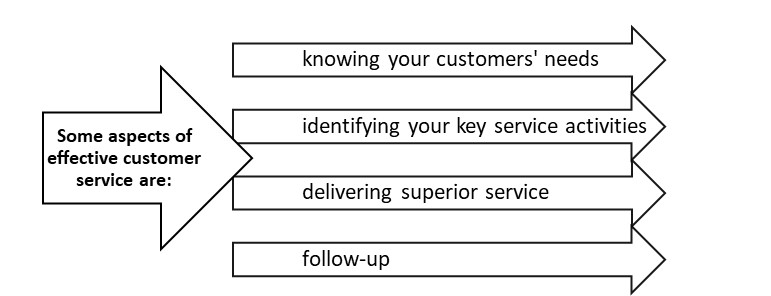
Use the handout of the case study of the Ritz Carlton Hotel.

Some organisations excel in pleasing their customers – one of these examples is the Ritz Carlton Hotel in New York, USA.

Summarise the case study on customer services related to the Ritz Carlton.

Use the following two diagrams as guideline of your summary of their strategy:

1. **Aspects of effective customer service**



1. **From the case study, identify any Customer Experience Solutions that the Ritz Carlton Hotel have implemented to add value to their Customer’s experience:**

To assist, here is the list of possible CEM solutions:

* The cross-channel (contact center, Internet, self-service, mobile devices, brick and mortar stores),
* Cross-touch point (phone, chat, email, Web, in-person),
* Cross-lifecycle (ordering, fulfillment, billing, support, etc.) nature of the customer experience process.

1. **From the case study, identify how the Ritz Carlton Hotel align their products and services to their market segment. Use the framework below:**
2. **Segmentation** (determine which kinds of customers exist.) Undifferentiated/concentrated/differentiated (underline the correct one). Explain your answer.
3. **Targeting** (select which ones we are best off trying to serve). How well are existing segments served by other manufacturers?
   1. How large is the segment, and how can wê expect it to grow?
   2. Do the Ritz Carlton have strengths as a company that will help them appeal particularly to one group of consumers?
4. **Positioning** (implement segmentation by optimizing products/services for that segment and communicating the decision). In what market type does the Ritz Carlton Hotel fall. Explain your answer in terms of price, product, distribution and promotion. (like in LG).

How would you categorise the Ritz Carlton Hotel as:

1. Operationally Excellent
2. Customer Intimate
3. Technology Excellent

Explain your answer:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 2A Individual Formative Exercise

# Identify Customer Buying Motives

## Instructions:

Decide whether the statement applies to a **Buyer (B), Searcher (S)** or **Browser (BR).**

|  |  |  |
| --- | --- | --- |
| 1. | “I’m interested in buying a word processor – model 290Y – the WordPro Max?” |  |
| 2. | The customer is wandering through the furniture selection admiring the displays. |  |
| 3. | The customer is picking up items, looking at them casually, then replacing them. |  |
| 4. | “Well … I’m kind of looking for a graduation gift for my niece.” |  |
| 5. | The customer walks decisively towards the jewellery department. |  |
| 6. | “No, I’m just waiting for my wife – she’s next door but thank you.” |  |
| 7. | “Where are your reference books located?” |  |
| 8. | “I’m looking for an inexpensive CD player.” |  |
| 9. | “No, really – I just came to see the holiday decorations.” |  |
| 10. | The customer is admiring the new fashion arrivals, but not picking up any item to examine. |  |
| 11. | “I’d kind of like to take a look at mattresses – but I’m not ready to buy today.” |  |
| 12. | “Those reverse drills are of very high quality. Are they on sale today?” |  |
| 13. | The customer walks disinterestedly through the appliance selection. |  |
| 14. | “How long would it take to get delivery on this living room set?” |  |
| 15. | The customer asks to see some jerseys but seems undecided about what to choose. |  |
| 16. | “I’m just looking, thanks.” |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 2B Individual Formative Exercise

## Distinguish Customer Purchasing Motives and Behaviours

## Instructions:

### Part 1:

Each person uses a complex number of techniques and references when making purchasing and buying decisions. You must choose a product from your company. You must now describe your purchasing motives/behaviours, using this framework:

1. Motive for choosing this product:
2. Need/Want, explain:
3. Describe what level of Maslow’s hierarchy this product satisfies and why:
4. Describe how you went through the 5 steps of customer purchasing decision. Describe the thought processes you went through in each step.
5. Was the decision: Routine/Limited/Extensive (underline the appropriate one). Explain why?
6. Explain how personal, social, cultural and psychological factors influenced your decision.
7. Explain how personal, social, cultural and psychological factors will influence different customer’s decisions.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **First Attempt** | | | **Second Attempt** | | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | | Not Yet Competent | Competent | | Not Yet Competent |
|  |  |  | |  |  | |  |

# 2C Individual Formative Exercise

# Checklist

## Instructions

Design a checklist that a customer can use to evaluate his/her purchasing experience. Use guidelines in your LG. (At least 20 questions)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 3A Individual Formative Exercise

# Moments of Truth

## Instructions:

Brainstorm the moments of truth – both magic and misery, that could be experienced by a customer. Think of as many as possible under each heading – at least four.

|  |  |  |
| --- | --- | --- |
| **Dimension** | **Moment of Magic** | **Moment of Misery** |
| **Tangibles** |  |  |
| **Empathy** |  |  |
| **Reliability** |  |  |
| **Responsiveness** |  |  |
| **Assurance** |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **First Attempt** | | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  | |  |  |  |

# 3B Individual Formative Exercise

# Determine Solutions and Implement Plan

1. **What** are the solutions you will offer to the management team of a company who have experienced the ‘moments of misery’ as described in **Formative Exercise 3A**? To answer, choose one ‘moment of misery’ described in F3A. As framework for your discussion, you can use one of the following methods:
2. The 4 circles of service (see in LG)
3. The 12 service specifications (see in LG)
4. **How** would you ensure that such solutions provide for optimum satisfaction of customer service within the constraints and priorities of the organisation?
5. **Which** stakeholders would you consult in developing the plan?
6. **Now**, compile an Action Plan to implement the solution/s suggested in question 1-3. Your action plan must contain the following:
7. SMART objectives/actions
8. Resources needed for each action
9. Timeframes for implementation
10. Responsible person/s for each action
11. **Wha**t role can change agents play in the implementation of the plan? Evaluate both positive and negative impacts?
12. **How** can continuous improvement be ensured in the implementation of the change plan?
13. **What** additional methods/tools can be used in the implementation of the change plan? (use the guidelines of your LG)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 4A Individual Formative Exercise

# Assess your Company

## Instructions

In the learner guide we discussed the formula for the measuring of customer service. Use this document to assess your company.

|  |  |  |
| --- | --- | --- |
| 1. Count the total of employees who are in contact with the customer before, during and after a transaction. | |  |
| 1. What is the potential loss? | | |
| Maximum worth |  | |
| Minimum worth |  | |
| Average worth |  | |
| 1. Potential impact of loss: | | |
| Average worth x 6 |  | |
| 1. Potential loss per contact with customer. (Divide the potential impact of loss by the total of employees | |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 4B Individual Formative Exercise

# Strategy, Policies and Procedures

## Instructions

1. From your company strategy document, **make a list** of the Customer Relation Strategy points.
2. **Make a list** of all the Customer Relations Policies and Procedures you have in your company. At each Policy/Procedure, **give a short summary** of how the policy influence your customer relations.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not yet Competent |
|  |  |  |  |  |  |

# 4C Individual Formative Exercise

# Customer Satisfaction Survey Questionnaires

## Instructions:

Design 2 x Customer Satisfaction Survey Questionnaires:

* 1 x for **Internal** customers and
* 1 x for **External** customers. (It will differ!)

Use the guidelines in your LG.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 4D Individual Formative Exercise

# KPA’s for Frontline Customer Service

## Instructions:

* Make a list of the 5 most important KPA’s for a frontline customer service employee in your company.
* Ensure that the KPA’s are SMART (indicate each one!)
* Ensure that KRA’s are in line with your Strategy regarding Customer Relations.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# 4E Individual Formative Exercise

# Feedback Session

## Instructions:

Ask two people to join you for this activity.

1. You will be the supervisor.
2. One person will be the frontline service provider.
3. The third person will be the observer.

**You as the supervisor** must have a feedback session while being observed and **the checklist are completed** by the observer. Use the checklist as provided on the next page.

**Scenario:**

You (the supervisor) were near one the employees when you noticed that he/she acted rudely towards a customer. Call the employee to your office and rectify his/her behaviour.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

## Checklist on Feedback to Frontline Service Provider

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **NAME OF “SUPERVISOR”** |  | | | |
| **NAME OF “EMPLOYEE”** |  | | | |
| **NAME OF “OBSERVER”** |  | | | |
| **DATE** |  | | | |
| **ACTION** | | | **YES** | **NO** |
| Did the supervisor welcome the employee to the meeting and put him/her at ease? | | |  |  |
| Did the supervisor explain the reason for the meeting? | | |  |  |
| Did the supervisor explain why he/she was not happy with the attitude of the employee towards the customer? | | |  |  |
| Did the supervisor give the employee a chance to explain his/her attitude? | | |  |  |
| Did the supervisor give specific feedback to the employee? | | |  |  |
| Did the supervisor give positive guidelines to the employee? | | |  |  |
| Did the supervisor give the employee a chance to ask questions? | | |  |  |
| **Signature of supervisor** | |  | | |
| **Signature of observer** | |  | | |
| **Signature of employee** | |  | | |

# 5A Individual Formative Exercise

# Selling Skills Questionnaire

## Intructions

1. **What** 3 questions should you ask to identify a prospective customer?
2. **What** are the methods that you can use for ‘prospecting’?
3. **What** detailed questions can you ask to draw up a profile of the ‘prospect’?
4. **Describe** what you should know about your company, product and product worth sufficiently to sell the product?
5. Company:
6. Product:
7. Product worth:
8. **Describe** the barriers that could occur in the selling presentation, as well as how you can overcome them.
9. **Describe** the buying signals that you can possibly observe whilst dealing with a customer.
10. **List** the 10 closing techniques of following up on a sales deal. **Evaluate** each technique/way by describing the positive and negative outcomes.

|  |  |  |
| --- | --- | --- |
| **Closing Techniques/Follow Through Ways** | **Pro’s** | **Cons** |
|  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First attempt** | | **Second attempt** | | **Third attempt** | |
| Competent | Not yet competent | Competent | Not yet competent | Competent | Not yet competent |
|  |  |  |  |  |  |

# 5B Individual Formative Exercise

# Checklist

## Instructions

* **Draw up a checklist**, containing all the steps of the sales process, as described in your Learner guide.
* **Detail** under each step must be sufficient to rate a salespersons’ performance in terms of closing the deal.
* This checklist will be used as part of Summative exercise 5.
* The checklist must be typed.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# Section C: Summative Exercises

# S1 Summative Exercise

## Instruction

For this exercise, you will evaluate your company’s customer communication plan, using the guidelines in your LG.

1. You need to hand in a report on your evaluation.
2. The following two aspects should be covered throughout the report:

* How does the communication plan distinguish customer motives and behaviours?
* How does the communication plan assess and respond to customer needs?

1. Your report must have the following headings:

* Determine your Objectives
* Determine the Frequency of communication
* Plan to be consistent
* Decide on a format
* Develop an editorial calendar
* Talk to your customers like customers, not prospects
* Take an educative approach
* Communicate on a one-to-one level

1. Conclude your report by making recommendations to your communications department on what improvements or changes you suggest making the communication plan more effective.

* Font: 11
* Space: 1.5

1. The report must be at least 5 typed pages.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# S2 Summative Exercise

## Instructions

1. Use the action plan you have compiled in Individual Formative 3B.
2. Prepare a presentation to your management team on how you will address the ‘moments of misery’.
3. Please include the following documents for assessment:

* A copy of your presentation, at least 5 slides.
* At least 3 evaluation forms completed by your management team (friends who act as management team – see checklist on the next page)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **CHECKLIST: DELIVERING A PRESENTATION**  **Learner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Evaluator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | |
| **CRITERIA** | **YES** | **NO** |
| 1. Content of the material presented was appropriate to the topic:    1. Did the presenter do appropriate research?    2. Did the presenter have appropriate knowledge on the subject presented    3. Facts were logically ordered and explained |  |  |
| 1. The delivery of the presentation was done well:    1. Was the presenter enthusiastic about the topic    2. Did he/she engage the audience    3. Did he/she handle questions appropriately    4. Did he/she speak clearly    5. Were the visual aids used appropriate |  |  |
| 1. The slide show quality was appropriate for purpose:    1. The slide show covered all the content    2. Verbal presentation complemented the slide show    3. Outlay of slides were easy to understand |  |  |
| 1. Non-verbal behaviour was appropriate:    1. Positive body language    2. Eye contact, use of hands etc.    3. Appropriate personal presentation and appearance |  |  |

|  |
| --- |
| Comments/General feedback to presenter: |

# S3 Summative Exercise

## Instruction

1. Use the survey documents you have compiled in Formative 4C.
2. Three internal customers must complete the survey document for internal customers and three external customers must complete the external customer survey document. (Submit all 6 completed survey forms).
3. From the survey documents, identify problem areas that occurred in your company. At least 5 problems should be identified. List the problems and explain each one in a short paragraph.
4. Now, compile an action plan for improvements. The action plan must include actions, resources, timeframes and responsible persons.
5. Add the 6 x completed survey forms to your PoE.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# S4 Summative Exercise

## Instruction

1. Use the KRA’s you have compiled in Formative exercise 4D to compile a performance discussion with two of your frontline employees. (adjust the KRA’s to their individual circumstances if necessary but ensure that the KRA’s remain SMART).
2. Now, have a performance discussion with the two employees. Hand in the summaries of these two discussions.
3. Draw up a performance improvement plan with each employee in the form of an action plan. (2x action plans).
4. Obtain feedback from each employee on how they experienced the performance discussion. This feedback should be attached to this exercise. (Two times feedback)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# S5 Summative Exercise

## Instructions

1. For this exercise you will need the checklist you have developed in Formative exercise 5B.
2. You are required to evaluate a salesperson on the task of ‘closing a deal’. You need to hand in a description of the following steps you have followed to complete this exercise:
3. Describe the real-life sales transaction that you observed for this exercise.
4. After the observation, you need to complete the checklist and hand in as annexure to your exercise.
5. Write a report on your evaluation of the sales transaction, detailing the positive sales behaviour you have observed, including why the behaviour was effective as part of the sales process. Also give feedback in the report on the negative sales behaviour you have observed as part of the sales process.
6. As part of the report, write a short instruction on how to effectively ‘close a deal’.
7. The final step is to have a discussion with the salesperson you have observed, giving feedback and discussing the instruction. Hand in a summary of this discussion.
8. For your PoE you need to hand in the evidence of each step of the above process.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First Attempt** | | **Second Attempt** | | **Third Attempt** | |
| Competent | Not Yet Competent | Competent | Not Yet Competent | Competent | Not Yet Competent |
|  |  |  |  |  |  |

# Section D: Assessor Mark Sheets

# Assessor Declaration of Learner Competence

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Outcomes of each unit standard** | **Assessment criteria** | **Notional Hours** | **Delineation of method of assessment**  **(Formative / Summative)** | **Assessed** | | **Competent** | | |
| **Date** | **Initial of assessor** | | **YES** | **NYC** |
| **US 10066** | | | | | | | | |
| Distinguish customer purchasing motives and behaviours | Personal, social, cultural and psychological factors are distinguished in terms of their relationship to, and impact upon customer purchasing decision motives and behaviours. | 120 min  20 hours | Individual Formative2B  Summative 2 |  |  | |  |  |
| Customer purchasing roles and decision processes are differentiated in relation to market type, customer base and product range. | 120 min  20 hours | Individual Formative2B  Summative 2 |  |  | |  |  |
| Evaluation of customer purchasing motives and behaviours examines trends in relation to the adoption of selling approaches | 20 min  20 hours | Individual Formative 2A  Summative 2 |  |  |
| Sales and service strategies are consistent with the information obtained to distinguish customer buying motives and behaviours | 30 min  20 hours | Individual Formative 2C  Summative 2 |  |  |
| Assess and respond to customer needs | Customer needs and preferences are defined in relation to products and services | 120 min  20 hours | Individual Formative1A  Summative 1 |  |  | |  |  |
| Sales and service strategies are developed for individual customers that acknowledge the extent to which the business can assist customers to maximise product value and benefits. | 120 min  20 hours | Individual Formative1A  Summative 1 |  |  |
| Sales and service strategies are developed for individual customers that identify customer needs from a customer perspective | 120 min  20 hours | Individual Formative1A  Summative 1 |  |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Outcomes of each unit standard** | **Assessment criteria** | **Notional Hours** | **Method of assessment**  **(Formative / Summative)** | **Assessed** | | **Competent** | | |
| **Date** | **Initial of assessor** | | **YES** | **NYC** |
| **US 10054** | | | | | | | | |
| Identify ‘touch points’ of customers | Moments of truth are identified and explained | 40 min  5 hours | Individual Formative3A  Summative 2 |  |  | |  |  |
| Customer service impact areas of vulnerability are identified and explained | 40 min  5 hours | Individual Formative3A  Summative 2 |  |  |
| The characteristics of customer service are identified in terms of their quantitative nature | 40 min  5 hours | Individual Formative3A  Summative 2 |  |  |
| Determine the solutions in areas of customer service | Solutions provides for the optimum satisfaction of customer service within the constraints and priorities of the organisation | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  | |  |  |
|  | The solution plan provides and compares options for customer service impact areas | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  | |  |  |
| Solutions are developed in consultation with all stakeholders and authorised and approves by individuals with authority to do so. | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  |
| Solutions are developed within agreed time frame and meet organisational specifications | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  |
| Action changes or improvement areas of customer service | Changes are implemented within agreed timeframes and in format | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  | |  |  |
| Solutions are justified in terms of their feasibility and usefulness in the management of customer service | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  |
|  | The role and usefulness of change agents are identified, and their strengths and limitations are assessed | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  | |  |  |
| Approaches for continuous improvement are evaluated and assessed in managing the planned changes or improvements | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  |
| Methodical tools and methods are used to facilitate the change or improvement process | 60 min  5 hours | Individual Formative 3B  Summative 2 |  |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Outcomes of each unit standard** | **Assessment criteria** | **Notional Hours** | **Method of assessment**  **(Formative / Summative)** | **Assessed** | | **Competent** | | |
| **Date** | **Initial of assessor** | | **YES** | **NYC** |
| **US 10052** | | | | | | | | |
| Monitor interaction between customer service provider and the customer | Systems are in place to measure the interaction between customer service providers and the customers | 20 min  5 hours | Individual formative 4A  Summative 2 |  |  | |  |  |
| The duration of the interaction is within agreed timeframes | 20 min  30 hours | Individual formative 4A  Summative 3 |  |  |
| The customer service provider interacts with the customer according to laid down procedures and processes | 60 min  30 hours | Individual Formative 4B  Summative 3 |  |  |
| The outcome of the interaction meets both the customer and the organisations requirements | 60 min  30 hours | Individual Formative 4C  Summative 3 |  |  |
| Monitor the customer’s satisfaction | Customer satisfaction is monitored at pre-determined intervals | 60 min  30 hours | Individual Formative 4C  Summative 3 |  |  | |  |  |
| Feedback is obtained from customers on their satisfaction | 60 min  30 hours | Individual Formative 4C  Summative 3 |  |  |
| Feedback is evaluated and analysed to determine satisfaction levels | 60 min  30 hours | Individual Formative4C  Summative 3 |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | The necessary steps to improve the level of customer satisfaction are taken | 60 min  30 hours | Individual Formative 4C  Summative 3 |  |  |  |  |
| Monitor key performance areas | Key performance areas are agreed with all frontline service providers | 30 min  20 hours | Individual Formative 4D  Summative 4 |  |  |  |  |
| Key performance areas are measurable, attainable and in line with the organisation’s requirements | 30 min  20 hours | Individual Formative 4D  Summative 4 |  |  |
|  | Key performance areas are measured against the set standards | 30 min  20 hours | Individual Formative 4D  Summative 4 |  |  |  |  |
| Feedback on performance is provided to all frontline service providers | 60 min  20 hours | Individual Formative 4E  Summative 4 |  |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Outcomes of each unit standard** | **Assessment criteria** | **Notional Hours** | **Method of assessment**  **(Formative / Summative)** | **Assessed** | | **Competent** | | |
| **Date** | **Initial of assessor** | | **YES** | **NYC** |
| **US 10047** | | | | | | | | |
| Apply personal selling skills to sell products or services | Product, service and client information is established in relation to selling the product or service | 45 min  20 hours | Individual Formative 5A  Summative 5 |  |  | |  |  |
| Techniques are incorporated in relation to listening, observation and questioning in relation to closing the deal | 45 min  20 hours | Individual Formative 5A  Summative 5 |  |  |
| Techniques are incorporated and applied that identify and qualify the customer and their needs | 45 min  20 hours | Individual Formative 5A  Summative 5 |  |  |
| Sales presentation techniques are applied to enable the deal to be closed | 45 min  20 hours | Individual Formative 5A  Summative 5 |  |  |
|  | Techniques are incorporated and applied that allow the handling of objections by the customers | 45 min  20 hours | Individual Formative 5A  Summative 5 |  |  | |  |  |
| Apply closing techniques to sell products or services | Closing or buying signals are observed and response is applied accordingly | 45 min  20 hours | Individual Formative 5B  Summative 5 |  |  | |  |  |
| Closing the sale/deal in terms of confirmation of commitment or decision to purchase is demonstrated | 45 min  20 hours | Individual Formative 5B  Summative 5 |  |  |
| Closing techniques are applied to close the deal | 45 min  20 hours | Individual Formative 5B  Summative 5 |  |  |
| All relevant documentation to confirm the deal is completed | 45 min  20 hours | Individual Formative 5B  Summative 5 |  |  |
| Processes to follow-up with customers are applied in terms of monitoring the fulfilment of the deal | 45 min  20 hours | Individual Formative 5B  Summative 5 |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Details of moderation | Name and signature of moderator: | Assessment result confirmed: | YES | NO |
| Moderator comments | | | | | |

# CCFO Marksheet

|  |  |  |
| --- | --- | --- |
| **Critical Cross-fields** | **Competent/ Not Yet Competent** | **Assessor Comments – complete in detail** |
| Identifying |  | The learners had to identify and compare the key characteristics of their company. |
| Organising |  | The learners had to organise internal and external surveys. |
| Collecting |  | The learners had to collect various documents of the company and evaluate it. |
| Communicating |  | The learners had to communicate within groups as well as back in the workplace to complete the summatives. |
| Demonstrating |  | The learners had to demonstrate their skills and knowledge back in the workplace with the summatives. |
| Contributing |  | The learners had to contribute to the group work during the training sessions. |
| Science |  | The learners had to compile and type checklists. |
| Working |  | The learners had to work effectively with others when handling the customers. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessor Signature** |  | **Date** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Moderator Signature** |  | **Date** |  |

# Assessment Decision

|  |  |
| --- | --- |
| **OVERALL ASSESSMENT SCORE** | |
| 1. Meets all the criteria for all the specific outcomes of the unit standard. |  |
| 1. Meet some, but not all the criteria for the specific outcomes of the unit standard. |  |
| 1. Clearly do not meet the criteria for the specific outcomes of the unit standard. |  |
| 1. More evidence is required in order to make a judgement of competence. |  |

# VACS Analysis

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Assessor Name** | |  | | | | | |
| **Date of Evaluation** | |  | | | | | |
|  | | **PRINCIPLE** | |  | **ASSESSOR REPORT** | | **MODERATOR REPORT** | |
| Validity of evidence | | Is the evidence appropriate and related to the specific outcomes? | | Y/N | YES | | YES | |
| Was there any evidence that prohibited the learner from meeting the assessment criteria? | | Y/N | NO | | NO | |
| Authenticity of evidence | | Is there proof that the evidence is the learner’s own work? | | Y/N | YES | | YES | |
| Currency of evidence | | Currency refers to the applicability of skills, knowledge and understanding in the present circumstances. Is the evidence current to the situation? | | Y/N | YES | | YES | |
| Sufficiency of evidence | | Is there enough evidence to meet all the criteria of the specific outcome to certify competency? | | Y/N | YES | | YES | |
| Will the learner be deemed competent if the learner’s performance is to be reported? | | Y/N | YES | | YES | |
| **Moderator Signature** |  | | | | **Date** | |  |
| **Assessor signature** |  | | | | **Date** | |  |

## Re-Assessment and Appeal Procedure

Learner completes the re-assessment and appeals application and delivers to the assessor

Assessor decides on actions to be taken:

* Discuss reasons and appropriate actions with learner
* Learner accepts and follows actions
* Assessor re-assess

Assessor or learner still not satisfied

* Appeals application together with actions taken and complete assessment portfolio to the internal moderator

Internal moderator discusses with assessor and learner together next steps and recommendations

* Re-assessment by moderator

Learner still not satisfied with results

* Appeals application, actions taken and complete assessment portfolio to the ETQA for verification

**The assessor has to provide the moderator with all appeals and re-assessment applications regardless if the learner accepts the results of the re-assessment or not.**

Reassessment should comply with the following conditions:

* Reassessment should take place in the **same situation or context** and under the same conditions
* The **same method and assessment instrument** may be used, but the **task and materials should be changed**. However, they should be of the same complexity and level as the previous one(s).
* Where the methods and instruments are changed, they must be appropriate for the outcomes specified.
* On Appeal the learner must complete and sign the appeals application (see appendix B)
* On reassessment the initial assessment plan should be extended and accepted by the learner.

**NOTE:**

Where several outcomes have been assessed and some, but not all, were achieved successfully, a decision has to be made about the credits for the successful outcomes, i.e. will the learner be able to retain these credits without having to be reassessed? If so, what would the assessment consist of then?

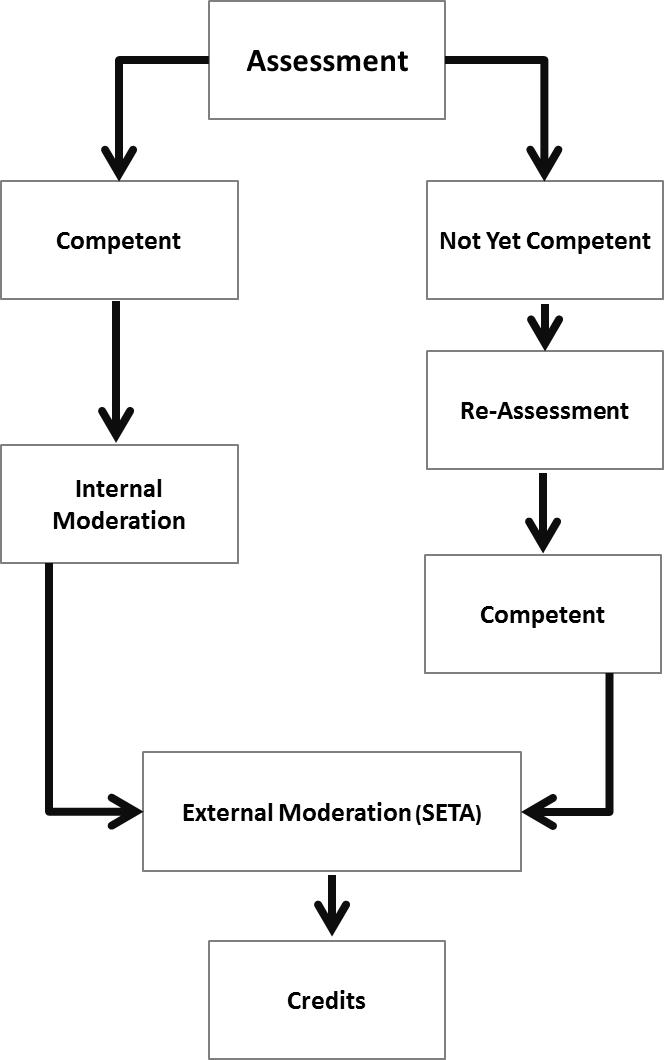
Care should be taken regarding **how often reassessment can be taken**, and the length of time between the original assessment and the reassessment. At the initial discussion of the assessment process and appeals procedure the learner and assessor agree on the number of re-assessments. **A learner who is repeatedly unsuccessful should be given guidance on other possible and more suitable learning avenues.**

Learners should be secure in the knowledge that they can appeal against an unfair assessment.

**Appeals can be brought against:**

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

# Appeals Procedure

****

# Appeals Application

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Standard Title** |  | **Unit Standard number** |  |
| **NQF level** |  | **Credits** |  |
| **Venue** |  | **Date** |  |
| **Learner Name** |  | **Learner ID number** |  |
| **Assessor Name and Surname** |  | **Assessor Registration number** |  |

|  |
| --- |
| **1. Please explain how you were assessed:** |
|  |
|  |
|  |
|  |
|  |
| **2. Please list the reason(s) for your appeal:** |
|  |
|  |
|  |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| **3. Please indicate what course of action you would find acceptable in order to resolve this issue. (For example, another assessor, a different assessment method, etc)** | | | |
|  | | | |
|  | | | |
|  | | | |
|  | | | |
|  | | | |
| **4. Please specify any additional requirements or needs you may have:** | | | |
|  | | | |
|  | | | |
|  | | | |
|  | | | |
| **Learner Signature** |  | **Date** |  | |
| **Moderator**  **Signature** |  | **Date** |  | |

| Assessor Feedback to Learner | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Assessor Declaration of Competence | 1st Attempt | | | 2nd Attempt | | | 3rd Attempt | |
| Competent | NYC | | Competent | | NYC | Competent | NYC |
|  |  | |  | |  |  |  |
| Date of declaration |  | | |  | | |  | |
| Feedback |  | | |  | | |  | |
| **Action Plan for Competence and Re-assessment** | | | | | | | | |
| The learner was assessed on the following date: | | | | |  | | | |
| The learner has not submitted sufficient evidence and is therefore not yet competent. | | | | | | | | |
| The learner is required to submit additional evidence against the following: (List the specific outcome and assessment criteria relevant below) | | | The learner is required to improve in the following areas: | | | | | |
|  | | |  | | | | | |
|  | | |  | | | | | |

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| --- | --- | --- | --- |
| **Learner Declaration** | I, ………………………………………………………… declare that I am satisfied that the feedback given to me by the Assessor was relevant, sufficient and done in a constructive manner. I accept the assessment judgment and have no further questions relating to this particular assessment instrument. | | |
| **Learner’s Signature** |  | **Date:** |  |
| **Assessor’s Signature** |  | **Date:** |  |
| **Moderator’s Signature** |  | **Date:** |  |

# Learner: Assessment Review

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Learner name** |  | | | | | |
| **Assessor name** |  | | | | | |
| **Date of assessment** |  | | | | | |
| **Question** | | | | | **Yes** | **No** |
| Was the assessment process explained to you before the assessment? | | | | |  |  |
| Did the assessor have a pre-assessment meeting with you? | | | | |  |  |
| Did you receive feedback after the assessment? | | | | |  |  |
| Was the assessment feedback clear enough? | | | | |  |  |
| Did you receive your feedback within the agreed time-frames? | | | | |  |  |
| Do you feel that the assessment was fair? | | | | |  |  |
| Do you feel that you received enough opportunities during the assessment to provide evidence to the assessor? | | | | |  |  |
| Did the assessor explain all the evidence requirements to you? | | | | |  |  |
| Were you given the chance to give your input in terms of the assessment process? | | | | |  |  |
| Was the evidence judged in accordance with the requirements outlined to you? | | | | |  |  |
| Was the feedback provided constructive? | | | | |  |  |
| Was the assessment documentation clear and user-friendly? | | | | |  |  |
| **Learner Signature** | |  | **Date** |  | | |
| **Assessor Signature** | |  | **Date** |  | | |
| **Moderator Signature** | |  | **Date** |  | | |

# Assessor: Assessment Review

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Assessor name** | |  | | | | |
| **Date of assessment** | |  | | | | |
| **Assessment Review** | | | | **Agree** | | **Disagree** |
| The learner provided inputs into the assessment process. | | | |  | |  |
| Before the assessment was conducted the learner understood what criteria and evidence will be used in the assessment process. | | | |  | |  |
| The assessment process was conducted in the learner’s work environment. | | | |  | |  |
| The assessment instruments were clear and easily understood by the assessor. | | | |  | |  |
| In similar circumstances the assessor will make the same judgment again. | | | |  | |  |
| The evidence requirements are relevant to the unit standards. | | | |  | |  |
| The evidence identified for this portfolio is sufficient. | | | |  | |  |
| The evidence produced by the learner can be verified as being authentic. | | | |  | |  |
| The assessment methods are suitable for the outcomes being assessed. | | | |  | |  |
| The assessment does not present any barriers for the learner. | | | |  | |  |
| All special needs have catered for and considered during the assessment. | | | |  | |  |
| The assessment instruments were manageable and user-friendly. | | | |  | |  |
| **General Comments:** I am satisfied with the process. | | | | | | |
| **Assessor Signature** |  | | **Date** | |  | |
| **Moderator Signature** |  | | **Date** | |  | |

# Assessment Review Report

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Standard Title** | **Customer service** | **Unit Standard Number** | **10052; 10054, 10066; 10047** |
| **NQF Level** | **5** | **Credits** | **33** |
| **Venue** | **Peritum offices** | **Date** |  |
| **Learner Name** |  | **Learner ID Number** |  |
| **Assessor Name** |  | **Assessor Registration Number** |  |

**Assessment Guide**

|  |
| --- |
| **Strengths** |
| Manageable and easy to use. Understandable and easy to handle. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| Nothing at this stage. |

**Assessment Process**

|  |
| --- |
| **Strengths** |
| Learners could complete some of the formatives in class and the summative back in the workplace.  Fair and open. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| Nothing at this stage. |

**Assessment Methods Used**

|  |
| --- |
| **Strengths** |
| The assessments tested both knowledge and the application of skills. Learners are able to apply knowledge and skills in the assessments. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| Nothing at this stage. |

**Assessment Instruments Used**

|  |
| --- |
| **Strengths** |
| The assessments tested both knowledge and the application of skills. It was easy understandable. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| None. |

**Learner's Readiness for Assessment**

|  |
| --- |
| **Strengths** |
| See pre-assessment meeting checklist. All the learners indicated their readiness. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| Nothing at this stage. |

**Unit Standard**

|  |
| --- |
| **Strengths** |
| Give good guidance of what is required from the learner. The unit standards were re-registered. |
| **Weaknesses:** |
| None. |
| **Recommendations:** |
| Nothing at this stage. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessor Signature** |  | **Date** |  |
| **Moderator Signature** |  | **Date** |  |

# Special Need Assessment

**Name of Course: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date of Course: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of Learner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Id of Learner: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of Assessor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Explanation of special need:

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Actions taken by assessor to complete the assessment:

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**LEARNER COMPETENT YES / NO**

Reasons if not yet competent:

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| --- | --- | --- | --- |
| **LEARNER SIGNATURE** |  | **DATE** |  |
| **ASSESSOR SIGNATURE** |  | **DATE** |  |
| **MODERATOR SIGNATURE** |  | **DATE** |  |