



GARRUN
GROUP

TRAINING
DEPARTMENT

Dear Student

We would like to welcome you as a student and also would like to thank you for choosing Garrun Training (PTY) Ltd as your preferred Training Provider.

Garrun Training (PTY) Ltd is an accredited training provider with INSETA with reference number: 130233.

The material herein has been provided by INSETA and is subject to their terms and conditions. Please note that comments in red are added by Garrun Training only and in no way aimed at altering or copywriting the INSETA material but aimed at assisting Garrun staff in better understanding the material.

Our primary goal is to facilitate the process of guiding you through Outcomes Based Education in order for you to achieve the qualification: 49929 FETC Short Term Insurance Certificate.

We wish you well in your endeavour and looking forward to working with you throughout this skills development programme.

Kind regards

Tim Timmerman

G.R. (Tim) Timmerman (LIISA)

33 Central Street, Houghton, 2198, PO Box 92337, Norwood, 2117

T: 011 694 5000 C: 082 808 6442 E: tim@garrun-training.co.za www.garrun-group.co.za



inseta

INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY

Learner Name	
ID Number	
Organisation	

FORMATIVE ASSESSMENT: LEARNER WORK FILE VERSION 1

Unit Standard Title: **Apply the skills of customer care in a specific work environment**

Unit Standard No: **119676**

Unit Standard Credits: **4**

NQF Level: **4**

Mark information:

Specific Outcome/Section	1	2	3	4	5	Total	%	C / NYC
Maximum marks	21	23	9	7	10	70	100	

This outcomes-based learning material was developed by Masifunde Training Centre with funding from INSETA in July 2014. The material is generic in nature and is intended to serve as a minimum standard for the industry.

This material may be used and copied for your own personal use. This material may not be republished, nor may it be reverse engineered, translated, modified or used to make derivative information of materials without the express written permission of INSETA which can be obtained by contacting insetacallcentre@inseta.org.za. Short excerpts from the material may be reproduced without authorisation on condition that the source is indicated.

Disclaimer

Whilst every effort has been made to ensure that the learning material is accurate, INSETA and Masifunde Training Centre (Pty) Ltd take no responsibility for any loss or damage suffered by any person as a result of the reliance upon the information contained herein.

Formative Activities

Section 1: 21 marks

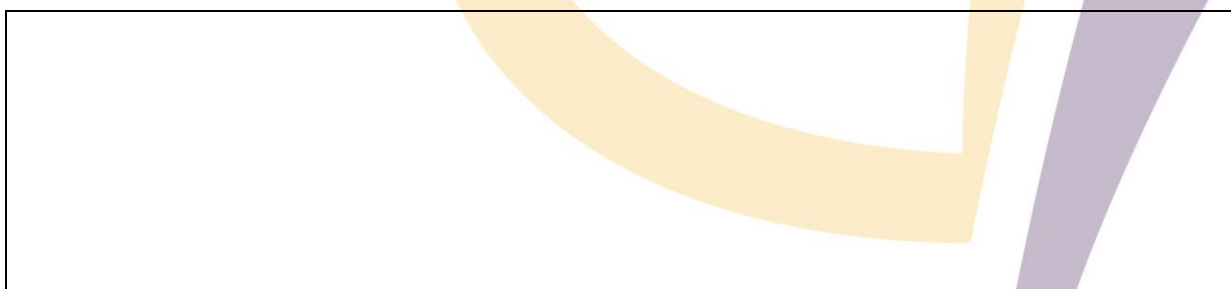
Activity 1

Conduct research about the current theories that exist about customer service and explain if you could identify any trends in your research. (5)



Activity 2

Explain what you understand as impressive customer service. Supply an example from your organisation or other organisations if you are not employed. (2)



Activity 3

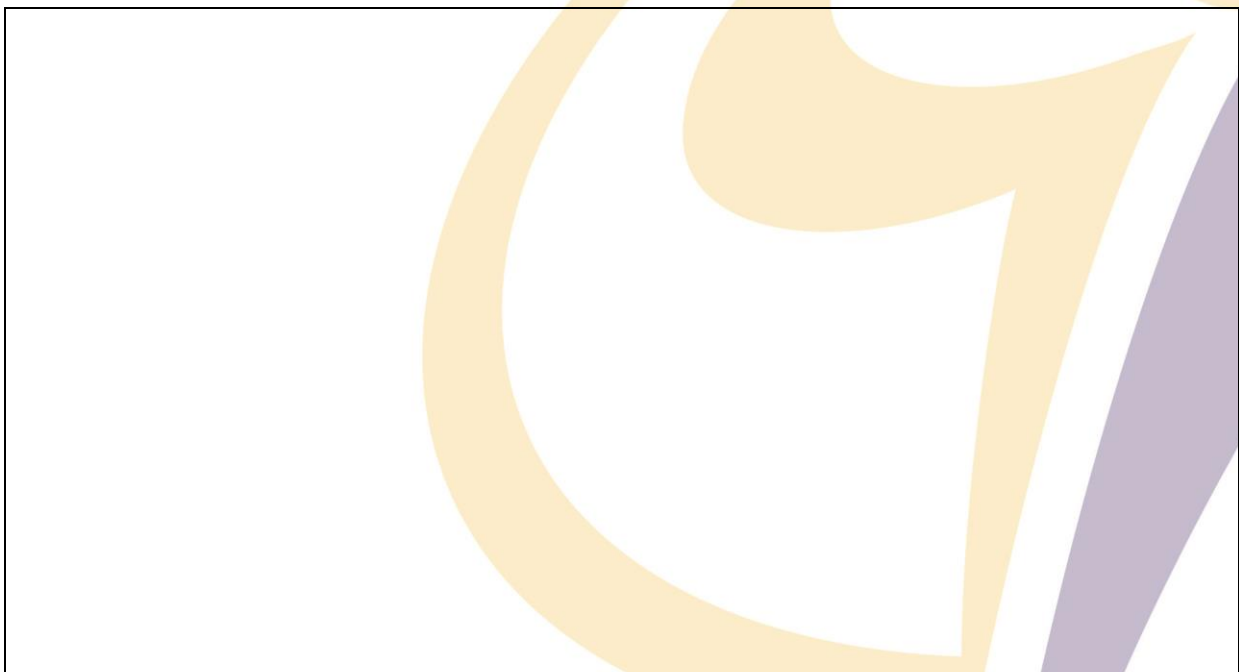
Name and explain 5 guidelines for impressive customer service.

(5)

**Activity 4**

Explain what you would consider as unacceptable customer service. Give an example from your or other organisations and make suggestions as to how the specific situation could be handled differently.

(3)



Activity 5

Name at least 3 annoying habits that may irritate customers.

(3)

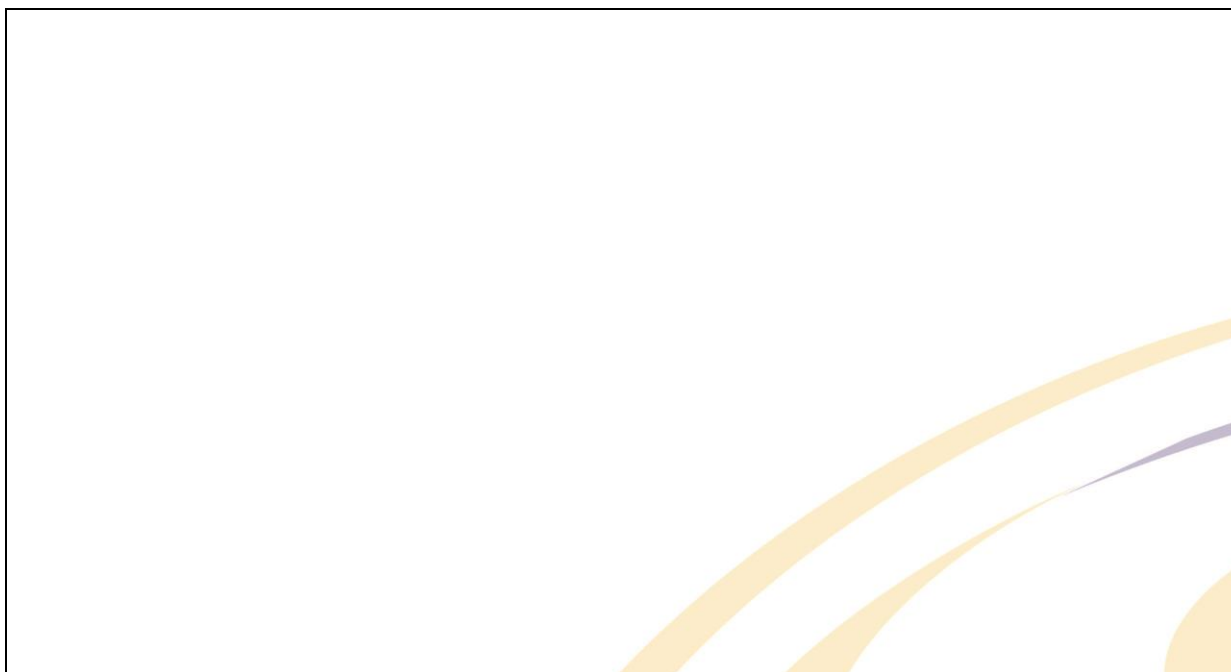
Activity 6

Explain the implications that poor customer service could have on an organisation. Make sure you answer from the point of view of the individual, the customer and the organisation.

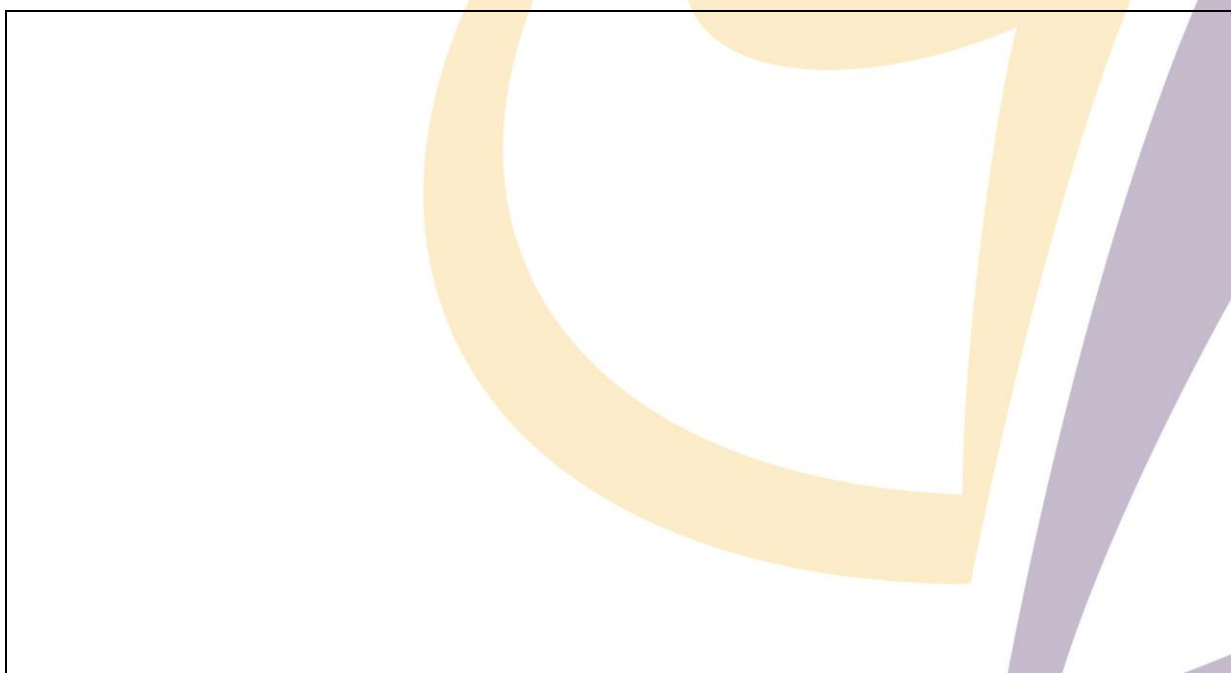
(3)

Section 2: 23 marks**Activity 7**

Source your company's policy and procedure with regards to customer care. Explain the possible consequences for you as employee of non-compliance with these policies and procedures. (4)

**Activity 8**

List 4 personality styles and briefly discuss the main personality traits of each of the personality styles mentioned. (4 x 2 = 8)





Activity 9

Write an essay about your own personality style and motivate why you think you have that specific personality style.

(3)



Activity 10

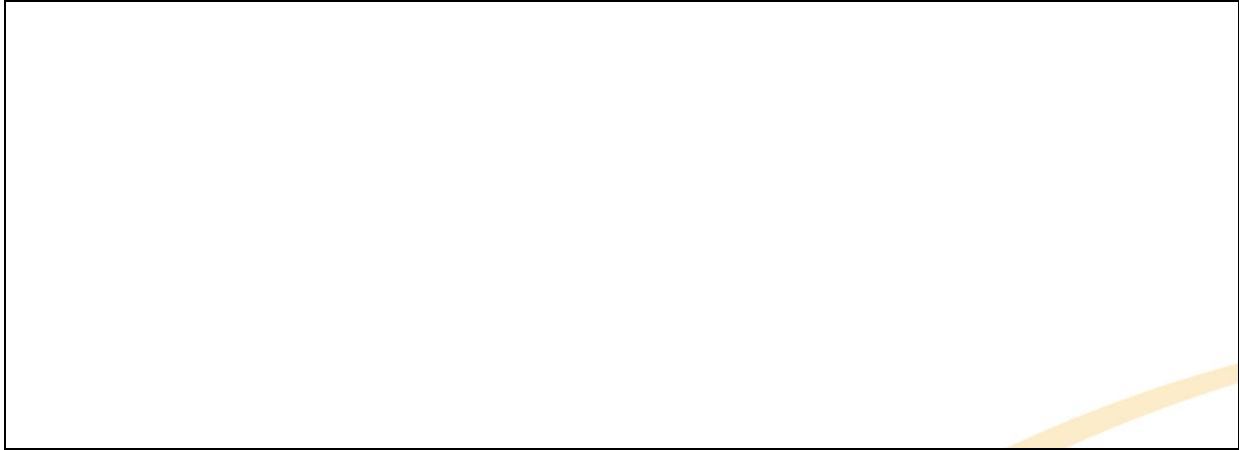
Interview two of your colleagues and write short notes on their personality styles. What would they be like as employees in a customer service environment and as customers? Justify your answer. Complete your answers in the table below:

(8)

Colleagues interviewed:	
Colleague 1:	Colleague 2:
How would they be as employees in a customer service environment?	
What would they be like as customers?	
Reasons for the above interpretation	

Section 3: 9 marks**Activity 11**

Explain possible ways in which one would overcome obstacles for at least two personality styles that you have mentioned in Activity 8. (2 x 2 = 4)

**Activity 12**

Explain what information is needed to address a query. (2)


**Activity 13**

Explain the consequences of providing inadequate/incomplete responses to queries. (3)



Section 4: 7 marks**Activity 14**

Study your company's conventional responses to frequently asked questions (FAQ's) and make suggestions as to how the responses could be improved to enhance customer satisfaction. If your company does not have FAQ's, develop at least 3 FAQ's with the "Model answers" for them. (½ x 6 = 3)

**Activity 15**

Explain the concept of ownership in customer care with reference to the benefits of ownership to the individual, customer and organisation. (2)



Activity 16

Use the customer service related policies and procedures of your company that you have sourced for Activity 7 and make at least 2 suggestions how these policies and procedures can be improved. (2)

Section 5: 10 marks

Activity 17

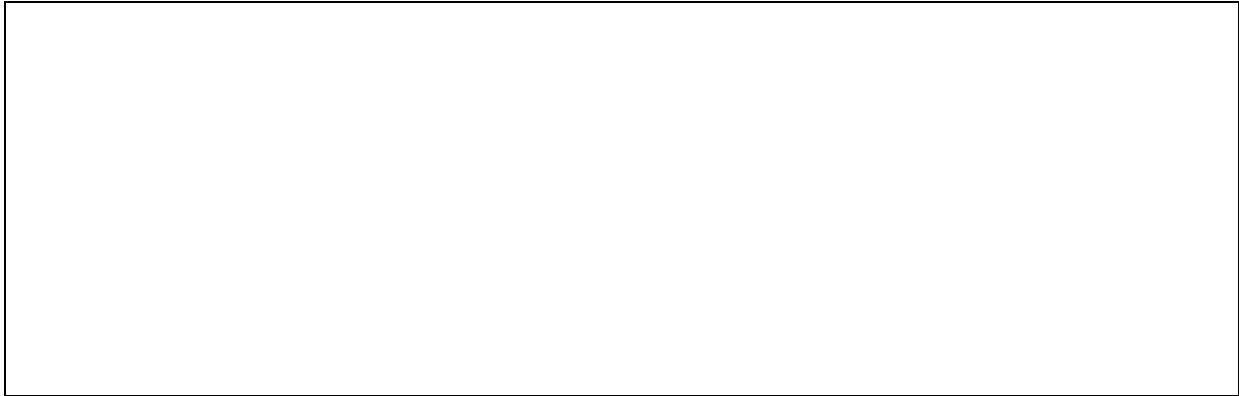
List possible reasons why an organisation would attempt to retain customers. (2)

Activity 18

Explain the concept 'customer loyalty' and give an example. (3)

Activity 19

List the possible ways in which your company (employer) / any other organisation attempts to retain customers. (2)

**Activity 20**

Explain, in your own words, the cost implications of customer management and give an example. (3)





All qualifications and part qualifications registered on the National Qualifications Framework are public property. Thus the only payment that can be made for them is for service and reproduction. It is illegal to sell this material for profit. If the material is reproduced or quoted, the South African Qualifications Authority (SAQA) should be acknowledged as the source.

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

Apply the skills of customer care in a specific work environment

SAQA US ID	UNIT STANDARD TITLE			
119676	Apply the skills of customer care in a specific work environment			
ORIGINATOR		ORIGINATING PROVIDER		
SGB Insurance and Investment				
QUALITY ASSURING BODY				
-				
FIELD			SUBFIELD	
Field 03 - Business, Commerce and Management Studies			Finance, Economics and Accounting	
ABET BAND	UNIT STANDARD TYPE	OLD NQF LEVEL	NEW NQF LEVEL	CREDITS
Undefined	Regular	Level 4	NQF Level 04	4
REGISTRATION STATUS		REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Reregistered		2009-07-01	2012-06-30	SAQA 0480/09
LAST DATE FOR ENROLMENT		LAST DATE FOR ACHIEVEMENT		
2013-06-30		2016-06-30		

In all of the tables in this document, both the old and the new NQF Levels are shown. In the text (purpose statements, qualification rules, etc), any reference to NQF Levels are to the old levels unless specifically stated otherwise.

This unit standard does not replace any other unit standard and is not replaced by any other unit standard.

PURPOSE OF THE UNIT STANDARD

This Unit Standard will be useful for learners who deal with the public, customers, internal and external clients, intermediaries, learners in call centres, walk in service centres, enquiries counters and marketing and learners who communicate with customers either telephonically or face to face.

The qualifying learner is capable of:

- Explaining the principles of impressive customer service in the context of a specific industry and organisation.
- Applying knowledge of personality styles to respond appropriately to a customer.
- Analysing information in order to provide customer service.
- Suggesting innovative solutions to respond to queries and improve customer service.
- Managing the relationship to retain customers.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

- Communication at NQF Level 3.
- Mathematical Literacy at NQF Level 3.

UNIT STANDARD RANGE

The typical scope of this Unit Standard is:

- Customers may be internal or external clients.
- Behaviour refers to both verbal and non verbal aspects and should reflect Emotional Intelligence.
- Ways of overcoming objections include, but are not limited to, empathy, conflict resolution and questioning techniques.
- Presentations may be verbal or written.
- Formats include, but are not limited to, telephonic exchanges, verbal presentations, emails, faxes, letters or reports.
- Appropriate language is adapted for the specific audience and purpose and should avoid the use of jargon.

Specific Outcomes and Assessment Criteria:

SPECIFIC OUTCOME 1

Explain the principles of impressive customer service in the context of a specific industry and organisation.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

Current theories of customer service are researched in order to identify trends.

ASSESSMENT CRITERION 2

Case studies are analysed to identify instances of impressive customer service.

ASSESSMENT CRITERION 3

Case studies are analysed to identify instances of unacceptable customer service and suggestions are made as to how each situation could be handled differently.

ASSESSMENT CRITERION 4

The implications of poor customer service are explained from the point of view of the individual, the customer and the organisation.

ASSESSMENT CRITERION 5

The consequences of non-compliance with an organisation's policies and procedures in dealing with customers are explained with examples.

SPECIFIC OUTCOME 2

Apply knowledge of personality styles to respond appropriately to a customer.

ASSESSMENT CRITERIA**ASSESSMENT CRITERION 1**

Different personality styles are investigated in order to understand interpersonal behaviour.

ASSESSMENT CRITERION 2

Own behaviour and that of three other people are analysed to determine personality style.

ASSESSMENT CRITERION 3

Anticipated behaviour is explained for selected personality styles and scenarios and an indication is given of how to respond appropriately in each situation.

ASSESSMENT CRITERION 4

Ways of overcoming objections or obstacles are demonstrated for at least two personality styles.

SPECIFIC OUTCOME 3

Analyse information in order to provide customer service.

ASSESSMENT CRITERIA**ASSESSMENT CRITERION 1**

Information that is needed to address a query is gathered and analysed to determine an appropriate response.

ASSESSMENT CRITERION 2

Background, industry, organisation and product knowledge are applied to a situation to ensure a comprehensive response.

ASSESSMENT CRITERION 3

The information is presented to the customer in the appropriate language, format and style.

ASSESSMENT CRITERION 4

The consequences of providing inadequate or incomplete responses to queries are explained with examples.

SPECIFIC OUTCOME 4

Suggest innovative solutions to respond to queries and improve customer service.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

The conventional responses to frequently asked questions are analysed and suggestions are made as to how the responses could be improved to enhance customer satisfaction.

ASSESSMENT CRITERION 2

The concept of ownership in customer care is explained with reference to the benefits of ownership to the individual, customer and organisation.

ASSESSMENT CRITERION 3

An organisation's customer service related policies and procedures are analysed and suggestions are made for possible adjustments or improvements.

SPECIFIC OUTCOME 5

Manage client relationships to retain customers.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

Reasons why an organisation would actively attempt to retain customers are identified for a specific organisation.

ASSESSMENT CRITERION 2

The concept of customer loyalty is explained with examples.

ASSESSMENT CRITERION 3

Ways in which an organisation actively attempts to retain customers are analysed for three different organisations.

ASSESSMENT CRITERION 4

The cost implications of customer management are explained with examples.

UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS

- This Unit standard will be internally assessed by the provider and moderated by a moderator registered by a relevant accredited ETQA or an ETQA that has a Memorandum of Understanding with the relevant accredited ETQA.
- An individual wishing to be assessed (including through RPL) against this unit standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Anyone assessing a learner against this unit standard must be registered as an assessor with the relevant ETQA or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Any institution offering learning that will enable achievement of this unit standard or assessing this unit standard must be accredited as a provider with the relevant ETQA, or with an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Moderation of assessment will be conducted by the relevant ETQA according to the policies and guidelines for assessment and moderation of that ETQA, at its discretion, in terms of agreements reached about assessment and moderation between various ETQAs (including professional bodies).

UNIT STANDARD ESSENTIAL EMBEDDED KNOWLEDGE

N/A

UNIT STANDARD DEVELOPMENTAL OUTCOME

N/A

UNIT STANDARD LINKAGES

N/A

Critical Cross-field Outcomes (CCFO):

UNIT STANDARD CCFO IDENTIFYING

Learners are able to identify and solve problems in which responses show that responsible decisions using critical thinking have been made in suggesting innovative responses to queries and ways to improve customer service.

UNIT STANDARD CCFO COLLECTING

Learners are able to collect, organise and critically evaluate information in researching current theories of customer service and gathering information to address a query.

UNIT STANDARD CCFO COMMUNICATING

Learners are able to communicate effectively in providing customer service and presenting information to customers in an appropriate format.

UNIT STANDARD CCFO DEMONSTRATING

- Learners are able to demonstrate an understanding of the world as a set of related systems by recognising the relationship between customer retention and customer service and explaining the consequences of inadequate responses.
- Learners are able to demonstrate cultural sensitivity in providing customer service to a diverse customer base and adapting language and responses to best service customer needs.

All qualifications and part qualifications registered on the National Qualifications Framework are public property. Thus the only payment that can be made for them is for service and reproduction. It is illegal to sell this material for profit. If the material is reproduced or quoted, the South African Qualifications Authority (SAQA) should be acknowledged as the source.