

Model Assignment

Issued September 2011

OCR Administration (Business Professional)

UNIT 9 (LEVEL 2) - COMMUNICATE WITH CUSTOMERS

Please note:

This OCR model assignment may be used to provide evidence for the unit above. Alternatively, centres may wish to adapt this assignment or devise their own assignment for the purposes of assessment. It is the centre's responsibility to ensure that any adaptations made to this assignment allow learners to meet all the assessment criteria and provide them with sufficient opportunity to demonstrate achievement across the unit.

This unit has a credit value of 3 on the Qualifications and Credit Framework (QCF). The scheme codes for the OCR Administration (Business Professional) qualifications towards which successful completion of this unit assessment may contribute are:

OCR Scheme code	Qualification Title	Qualification Accreditation Number (QAN)
03952	OCR Level 1 Award in Administration (Business Professional)	500/6124/0
03953	OCR Level 1 Certificate in Administration (Business Professional)	500/6122/7
03954	OCR Level 1 Diploma in Administration (Business Professional)	500/6123/9
03956	OCR Level 2 Certificate in Administration (Business Professional)	500/6563/4
03957	OCR Level 2 Diploma in Administration (Business Professional)	500/6125/2
03958	OCR Level 3 Award in Administration (Business Professional)	500/6483/6
03959	OCR Level 3 Certificate in Administration (Business Professional)	500/6484/8
03963	OCR Level 3 Diploma in Administration (Business Professional)	500/6485/X

The QCA Accreditation Number for this unit is: H/502/4715

This OCR model assignment remains live for the life of these qualifications.

ALL THESE MATERIALS MAY BE PHOTOCOPIED. Any photocopying will be done under the terms of the Copyright Designs and Patents Act 1988 solely for the purposes of assessment.

G350 11-09

Model Assignment: Tutor Information

OCR Administration (Business Professional)

UNIT 9 (LEVEL 2) - COMMUNICATE WITH CUSTOMERS

Introduction to the Tasks

The tasks have been designed to enable learners to demonstrate their skills, knowledge and understanding of professional communication in the business world. In this assignment, learners will be able to demonstrate their skills of communicating effectively with customers in person and over the phone, following procedures and protocols when dealing with customers and completing appropriate documentation to ensure information is collected and distributed as appropriate. The tasks have been designed so that all of the assessment criteria in Unit 9 are addressed.

Please note: assessors will need to complete a Witness Statement for Tasks 1 and 3. As these tasks cover similar Assessment Criteria and it is likely that centres may assess candidates on more than one task in a short period of time, assessors **do not** need to complete a separate Witness Statement for each task. (Although assessors may complete a separate Witness Statement for both tasks if they wish, if this fits better with how and when the tasks are performed and assessed.)

However, a Witness Statement **must** be completed for each learner and assessors must show clearly on each form which tasks and Assessment Criteria are being evidenced.

These guidance notes must be used in conjunction with the unit specification and Centre Handbook.

The Tasks

Task 1: Communicating with a new customer

Assessment Criteria: 2.1, 2.2, 3.1 and 3.2 are assessed in this task.

The tutor should set up a telephone role play with a suitable person acting as Joan Christie/Christopher. The learner needs to telephone the potential customer and obtain all the information that would be required to allow work to be carried out. Having made the call successfully, the learner should complete a new customer enquiry form to add to the Witness Statement or audio evidence. A witness testimony or audio recording must be provided as part of the evidence. If the evidence is a recording then it should be in a universal format which requires no specialist software.

Task 2: Being sure of procedures

Assessment Criteria: 1.1, 2.1, 2.2 and 3.1 are assessed in this task.

A checklist is provided and responses to the questions provide the evidence for this task.

Task 3: Resolving a complaint

Assessment Criteria: 1.1, 2.1, 2.2, 2.3, 2.4, 3.1 and 3.2 are assessed in this task.

A face to face role play should be set up with a suitable person acting as a customer, Mr Gray. The learner should resolve Mr Gray's complaint appropriately and complete any relevant documentation as evidence, in addition to Witness Statement/video evidence. If the evidence is a recording then it should be in a universal format which requires no specialist software.

Scope of permitted Model Assignment modification

The model assignment is self-contained in its present form. The set of tasks form a coherent whole addressing all the Assessment Criteria [AC].

No changes to the Assessment Criteria are permitted. However, the model assignment can be changed in terms of the introductory scenario, which can be contextualised or amended. The scenario must still be set within a business context and must have a clear business purpose/objective.

The following would remain broadly the same, providing a common structure for the range of model assignments produced:

- individual learners' evidence for practical activities
- controls for task taking
- links to other unit assignments, learning and work experience

If modifications are made to the model assignment it is up to the centre to ensure that all assessment criteria are adequately covered.

Checklist of types of evidence

When completing this model assignment it may be possible to generate evidence for completing a task in a variety of formats. This list is not exhaustive and will depend on the approach taken to complete the task or model assignment. In some cases the task will require a specific format for the outcome and this will be clearly marked in the table with these items in bold.

Task activity	Examples of evidence – specifically required items in bold	Assessment Criteria coverage
Task 1 Communicating with a customer	<ul style="list-style-type: none"> • Completed Witness Statement/audio recording • Completed new customer enquiry form 	Assessment Criteria <ul style="list-style-type: none"> • 2.1 • 2.2 • 3.1 • 3.2
Task 2 Being sure of procedures	<ul style="list-style-type: none"> • Completed responses to checklist questions 	Assessment Criteria <ul style="list-style-type: none"> • 1.1 • 2.1 • 2.2 • 3.1
Task 3 Resolving a complaint	<ul style="list-style-type: none"> • Completed Witness Statement/audio recording • Completed documentation 	Assessment Criteria <ul style="list-style-type: none"> • 1.1 • 2.1 • 2.2 • 2.3 • 2.4 • 3.1 • 3.2

Witness Statement – Task 1 and Task 3

This form is to be used to testify or corroborate what has actually been observed.

Witnesses are people who can comment on work/performance/activities and can be:

- A qualified tutor/assessor
- Someone who has competence in the subject and a knowledge of the evidence requirements of the qualification.

AC 2.1, 2.2, 3.1 & 3.2	<input type="checkbox"/> Task 1 – Communicating with a new customer
AC 1.1, 2.1, 2.2, 2.3, 2.4, 3.1 & 3.2	<input type="checkbox"/> Task 3 – Resolving a complaint

LEARNER NAME	
CENTRE NUMBER	
Date/s of activity	

ASSESSOR FEEDBACK

Assessment Criterion 1.1 Identify differences between internal and external customers	
Assessor comments	
Assessment Criterion 2.1 Communicate with customers in compliance with organisational requirements including face to face and on the telephone	
Assessor comments	

Assessment Criterion 2.2	
Comply with organisational requirements when communicating with customers	
Assessor comments	
Assessment Criterion 2.3	
Resolve customer complaints in accordance with organisational requirements	
Assessor comments	
Assessment Criterion 2.4	
Identify the ways in which personal behaviour can have an impact on customers	
Assessor comments	

--	--

Assessment Criterion 3.1 Record customer information following organisational procedures	
---	--

Assessor comments	
--------------------------	--

Assessment Criterion 3.2 Pass on any action points in accordance with organisational procedures	
--	--

Assessor comments	
--------------------------	--

GENERAL COMMENTS	

I confirm that the learner above has achieved each of the Assessment Criteria listed whilst performing the tasks above.

Signed (Witness): _____

Name and position _____

Date: _____

Model Assignment: Learner Information

OCR Administration (Business Professional)

UNIT 9 (LEVEL 2) - COMMUNICATE WITH CUSTOMERS

Q *Do I have to pass this assignment?*

A Yes. You must pass this assignment to achieve the unit.

Q *What help will I get?*

A Your tutor will help you when completing the OCR model assignment and will make sure that you know what resources/facilities you need and are allowed to use.

Q *What if I don't understand something?*

A It is your responsibility to read the assignment carefully and make sure you understand what you need to do and what you should hand in. If you are not sure, check with your tutor.

Q *Can I use other people's work?*

A No. The work that you produce must be your own and you may be asked to sign a declaration confirming this. You should never copy the work of other learners or allow other learners to copy your work. Any information that you use from other sources, e.g. books, newspapers, professional journals or the Internet must be clearly identified and not presented as your own work.

Q *Can I work in a group?*

A Yes. However, if you work in a group at any stage you must still produce work that shows your individual contribution.

Q *How should I present my work?*

A You can present your work in a variety of ways, e.g. hand-written, word-processed, on video. However, what you choose should be appropriate to the task(s) and agreed with your tutor. For some work, e.g. presentations, role-play, work experience, you will need to provide proof that you completed the task(s). A witness statement or observation sheet will usually be used for this. If you are unsure, check with your tutor.

Q *When I have finished, what do I need to hand in?*

A You need to hand in the work that you have completed for each task. Do not include any draft work or handouts unless these are asked for. When you hand in your work make sure that it is has your name and the unit title clearly marked and that it is in the correct order for assessment.

Q *How will my work be assessed?*

A Your work will be marked by an assessor in your centre. The assessor will mark the work using the assessment objectives in the qualification specification. The work will then be sent to an OCR Moderator to ensure that assessors from all centres are marking correctly. You have not passed this unit until this is confirmed by OCR.

Q *Will my work be returned?*

A Submitted work will not be returned so please ensure you keep copies of everything you produce.

Scenario

Help-at-Hand

You are a receptionist working mornings only at Help-at-Hand Limited, a newly established company which offers a range of cleaning, home help and maintenance services. Your colleague, Sajida Begum, carries out the same role in the afternoons. From 12.30 – 1.30 you are both in the office to ensure there is a smooth handover.

One of the company's directors, Gladys Lynas, is based in the office and is keen to introduce clear procedures for communicating effectively with both external and internal customers. To move things forward, she recently produced the following information sheet for all staff.

Help-at-Hand

How to respond to customers

A. On the telephone

- 1) Always pick up the telephone within five rings. Remember, double rings indicate an external caller and single rings indicate an internal caller.
- 2) When responding to an external caller always greet the caller, identify the company, identify yourself and also show that you are keen to help. For example, you could say: *"Good morning/afternoon. Help-At Hand. Gladys speaking. How can I help you?"* remembering to say your own name, not mine!
- 3) If you're actually making the call e.g. when you're ringing a customer back, you should still start in the same way and then identify the purpose of the call. For example:

"Good morning/afternoon. This is Gladys from Help-At Hand. I'm ringing you about....."
- 4) When responding to an internal caller, you can be a bit less formal but you should still be polite and always say who you are and what department you are in. For example:

"Hello. Reception here. Gladys speaking. Can I help you?"
- 5) Whether the call is internal or external, if it is about something you cannot answer or resolve immediately, make sure you make a note of the key information eg who is calling, where from, their query, their phone number and/or email (particularly important when dealing with our customers), any important deadlines and who the message is for. Use the company message pad. Make sure you then pass the message on!!

B. In person

- 1) Although most of our customers ring, some do call in so make sure you're polite and friendly to everyone who walks in to the office.
- 2) Remember if they're in the office they can see you so smile, make eye contact, invite them in, identify yourself and ask what you can do to help.
- 3) Just as when you're on the phone, make sure you note down the key pieces of information and make sure you get enough details – we have over 20 customers called Mrs Wilson and we don't want to have to ring every one of them!

Gladys has also produced two further documents, a message form and a new customer enquiry form. These can be found in Appendix 1.

Tasks

Task 1: Communicating with a new customer

Assessment Criteria: 2.1, 2.2, 3.1 and 3.2

When arriving at work, you find that your colleague, Sajida, has left you the following note.

Hi there!

A new customer rang up at the end of the day just as I was leaving, saying she wanted some cleaning and maintenance doing asap. I didn't have time to get anything but her basic details. Her name's Joan Christie (or it might have been Christopher??) and her number is 01234 456890.

Could you give her a ring back in the morning because she said she was going away at lunchtime and wanted to get everything sorted before she went? Talk about last minute!

Let me know how it goes.

Sajida

Your task is to:

- telephone the potential customer, making sure you get all the information necessary for any work requested to be done
- complete a new customer enquiry form (see Appendix 1).

Your evidence will be:

- a Witness Statement/audio recording
- a completed new customer enquiry form.

Task 2: Being sure of procedures

Assessment Criteria: 1.1, 2.1, 2.2 and 3.1

Gladys Lynas wants to be sure that the procedures are clearly understood by all staff and so has circulated the following checklist to everyone.

Your task is to:

- answer the questions in the following checklist.

<p>Help-at-Hand</p> <p>Procedure Checklist</p> <p>1) Give an example of an internal customer and an example of an external customer of Help-at-Hand Limited.</p> <p>2) When the phone rings, how can you tell if it is an internal or external caller?</p> <p>3) What can you do to make sure customers feel welcomed and valued, particularly if they call in person? List three things.</p> <p>4) What document should you complete if a customer calls in person to complain?</p>
--

Your evidence will be a completed set of responses to the questions.

Task 3: Resolving a complaint

Assessment Criteria: 1.1, 2.1, 2.2, 2.3, 2.4, 3.1 and 3.2

You are working in reception as usual when a customer, Mr Gray, comes into the office. He complains about the fact that his house has not been cleaned properly for the last two weeks.

Your task is to:

- deal with his complaint in an appropriate manner
- complete any relevant documentation accurately.

Your evidence will be:

- a Witness Statement/video recording
- completed documentation.

Appendix 1

Help-at-Hand

Message form

Date & time:

Message taken by:

Message to be passed to:

Enquirer Details:

Name _____

Tel no: _____

Email: _____

Message:

Help-at-Hand

New Customer Enquiry Form

Customer Details:

Name _____

Tel no: _____

Email: _____

Address: _____

Work Details:

Circle as appropriate –

Cleaning Maintenance Gardening Home help Decorating services.

Give full details of work required:

Date work to commence:

Details taken by:

Date:

When completed one copy of this form should be passed to accounts and further copies to each of the departments where work has been requested.

Learner Evidence Checklist

OCR Administration (Business Professional)

UNIT 9 (LEVEL 2) - COMMUNICATE WITH CUSTOMERS

LEARNER NAME: _____

CENTRE NUMBER: _____

Task 1 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Completed Witness Statement	
<input type="checkbox"/> Other (please give details)	
<input type="checkbox"/> Completed new customer enquiry form	

Task 2 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Response to checklist questions	

Task 3 evidence provided (please ✓):	Ref/Page no(s)
<input type="checkbox"/> Completed Witness Statement	
<input type="checkbox"/> Other (please give details)	
<input type="checkbox"/> Completed documentation	

I confirm that the items listed above are attached. These have been assessed and provide sufficient evidence to demonstrate that the learner has achieved all of the assessment criteria for this unit.

Signed: _____

Name and position _____

Date: _____