

**THE  
GET  
GROUP**



Kia hāpai ngā rangatahi o Aotearoa  
HELPING YOUTH THRIVE IN NEW ZEALAND

# Individual Assessment Standard

## LEVEL 2

## Unit Standard 57

**Provide customer service**

Level 2 / Credits 2 / Version 11

Learner Name: \_\_\_\_\_

School/Workplace: \_\_\_\_\_

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

[www.thegetgroup.co.nz](http://www.thegetgroup.co.nz)

LEARNER WORKBOOK & ASSESSMENT



# Assessment Overview

## Delivery and Assessment Conditions

- Delivery and assessment are undertaken remotely by The GET Group through supported remote learning and supervised assessment.
- This resource provides information on all the required evidence for the unit standard.
- Learner information and results are collected by The GET Group and reported to the school to enter onto their internal LMS using The GET Group provider code.
- Schools may result through their own provider code if they have consent to assess through the standard setting body.
- Learner assessments may be used for internal or external moderation and passed onto third party moderators for this purpose.

## Notes for the Learner

- This is an open book assessment, and all questions must be answered to successfully complete the standard.
- Please read each question carefully, answer it to the best of your ability and in your own words. Avoid using one-word answers unless you are asked to use bullet points.
- Ensure your answers are in blue or black pen and can be clearly understood.
- Where necessary and practicable for the purposes of the unit standard requirements, you may be required to provide video evidence to The GET Group for an assessment.

## Learner Resubmissions

- The GET Group aims to provide you with the relevant resources, training and support to gain **comprehension and understanding** of the topic. We aim to get you ready for assessment and able to meet the requirements of the standard at the appropriate level on the New Zealand Qualifications Framework.
- You will be given up to **three opportunities** to complete the assessment tasks to meet the expected standard.
  - ☐ If you are unable to meet the standard on your first or second attempt, your remote GET Group Assessor will inform you of the decision and give you guidance on areas you can improve.
  - ☐ If you do not meet the requirements of the assessment on your third attempt, you will receive a **Not Yet Achieved** result.
  - ☐ If you do not agree with the final assessment decision you can appeal the decision with The GET Group and request an alternative assessor to review your work.
  - ☐ If the alternative assessor agrees with the decision, the original decision will stand.

*Please refer to The GET Group Code of Conduct on our website for further information regarding our ethical standards, staff standards, behavioural procedures, health and safety and complaints processes.*

## LEARNER DECLARATION

I confirm that I have read and understood the conditions of this assessment, and I have had the opportunity to get clarification from my Assessor. I confirm that all work completed in this assessment will be my own, and I will produce it without help from anyone else. I confirm that the process by which I can seek a review of my marked work has been outlined to me.

Learner signature: \_\_\_\_\_

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

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<b>Title</b>	<b>Provide customer service</b>		
<b>Level</b>	<b>2</b>	<b>Credits</b>	<b>2</b>

<b>Purpose</b>	This unit standard is for people entering, or employed in, the service sector who would like to build their customer service skills. People credited with this unit standard are able to: describe customer service; provide customer service; and respond to a customer complaint.
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 This unit standard can be assessed against in a simulated situation. This refers to a situation that reflects some elements of commercial realism, but the candidate must be under time pressure.
- 2 *Definitions* Customer service refers to any action taken to meet customer needs and expectations in relation to the provision of goods or services. Workplace refers to a place of paid or voluntary employment. Workplace requirements refer to documented policies and procedures or established protocols for workplace performance and may include but are not limited to – any legal requirements, standards, codes of practice, company and/or site procedures, and any industry best-practice documents.
- 3 The following legislation and subsequent amendments provide reference, where needed, for this unit standard: Health and Safety at Work Act 2015 Human Rights Act 1993 Privacy Act 2020
- 4 All assessment tasks must be carried out in accordance with workplace requirements.

### Outcomes and performance criteria

#### Outcome 1 - Describe Customer Service

##### Performance criteria

1.1 Customer service is described in terms of its significance to an organisation.

*Range profit, customer satisfaction, reputation, customer loyalty, customer feedback.*

1.2 Interpersonal factors are described in terms of their influence on customer service.

*Range may include but is not limited to – personal presentation, attitude, motivation, interest, responsiveness, body language, communication.*

#### Outcome 2 - Provide customer service.

##### Performance criteria

2.1 Customer is greeted.

*Range includes but is not limited to – smile, polite language, greeting, promptness, personal presentation.*

2.2 Skills for customer service are demonstrated.

*Range includes – questioning, clarifying, reflective listening.*

2.3 Ability to maintain customer service level when dealing with several demands at one time is demonstrated.

2.4 Customer requirements are met to customer satisfaction or customer is referred to more experienced staff.

#### Outcome 3 - Respond to a customer complaint.

##### Performance criteria

3.1 The nature of the customers' complaint is identified.

3.2 Skills for handling customer complaints are demonstrated.

*Range may include but is not limited to – active listening, open questioning, follow-up.*

3.3 Customer's complaint is met to customer satisfaction or customer is referred to more experienced staff.



# Mastering the Art of Customer Service

## Impact of Customer Service on an Organisation

Customer service is crucial for an organisation's success.

- **Profit:** Satisfied customers often become repeat customers, leading to increased revenue.
- **Customer Satisfaction:** Meeting customer needs and expectations builds loyalty.
- **Reputation:** Excellent customer service enhances the organization's reputation.
- **Customer Loyalty:** Satisfied customers are more likely to recommend the business.
- **Customer Feedback:** Valuable insights for improvement can be gained from customer feedback.



## How Interpersonal Factors can impact on Customer Service

Interpersonal skills significantly impact customer service.

- **Personal Presentation:** Appearance and hygiene reflect professionalism.
- **Attitude:** A positive and helpful attitude creates a welcoming atmosphere.
- **Motivation:** Enthusiasm and dedication to providing excellent service.
- **Interest:** Genuine interest in the customer and their needs.
- **Responsiveness:** Prompt and attentive service.
- **Body Language:** Non-verbal cues that communicate openness and engagement.
- **Communication:** Clear and effective verbal and non-verbal communication.

## Greeting the Customer

A warm and welcoming greeting sets the tone for the interaction.

- **Smile:** Creates a positive first impression.
- **Polite Language:** Use respectful and courteous language.
- **Promptness:** Acknowledge the customer promptly.
- **Personal Presentation:** Ensure a professional appearance.

## Customer Service Skills

Effective communication and problem-solving are essential.

- **Questioning:** Ask open-ended questions to understand customer needs.
- **Clarifying:** Seek clarification to avoid misunderstandings.
- **Reflective Listening:** Demonstrate understanding by paraphrasing or summarizing.

## Handling Multiple Demands & Distractions

Manage competing priorities while maintaining customer focus.

- **Prioritisation:** Determine the most urgent needs.
- **Time Management:** Efficiently allocate time to each customer.
- **Communication:** Inform customers of potential wait times.

## Meeting Customer Requirements

Strive to exceed customer expectations.

- **Satisfaction:** Ensure the customer is satisfied with the service or product.
- **Referral:** Encourage satisfied customers to recommend the business.
- **Follow-up:** Address any unresolved issues promptly.

## Respond to a Customer Complaint

Understand the nature of the complaint to find a suitable solution.

- **Active Listening:** Pay close attention to the customer's concerns.
- **Clarifying Questions:** Seek additional details to fully understand the issue.
- **Empathy:** Show understanding and compassion.

## Handling Customer Complaints

Resolve complaints effectively and professionally.

- **Apologize:** Acknowledge the customer's frustration.
- **Problem-solving:** Work to find a solution to the issue.
- **Follow-up:** Ensure the customer is satisfied with the resolution.

## Tips to Help you Deal with Complaints

- **Listen intently** - Listen to the customer and don't interrupt them. They need to tell their story and feel they have been heard.
- **Thank them** - Thank the customer for bringing the problem to your attention – you can't fix something you don't know about.
- **Apologise** - Tell the customer you are sorry for the way the situation has made them feel – make sure your apology is sincere.
- **Seek the best solution** - Find out what the customer is seeking as a solution. Ask them; often they'll surprise you by asking for less than you initially thought you'd have to give, especially when they can see that your apology and your *intentions* are sincere.
- **Reach agreement** - Agree with them on a solution that will fix the situation to their satisfaction, within your responsibilities.
- **Escalate the issue if required** - If you don't have the authority to solve the problem, take the customer to someone who can. Or if the customer is not happy with what you are offering, then take them to your manager or supervisor so they can help.
- **Take quick action** - Act quickly. Customers often react positively because you help them straight away (rather than because of the actual solution itself).
- **Follow up** - Follow up or make sure the customer is completely satisfied. This is the most important step because if you spent time and effort to find a solution, you want to be sure that the customer is happy with the outcome. It is especially important if you had to bring in other team members or your manager to resolve the complaint. Also, if the customer isn't satisfied, you want to have the chance to find another solution that will satisfy.

Word of mouth is a powerful thing- if someone has a bad experience, they are very likely to tell their family and friends. This means you could lose many customers NOT just 1!

## HOW TO HANDLE CUSTOMER COMPLAINTS

"It isn't the complaint the customer remembers, but the outcome." Isadore Sharp








## Steps to Resolve Customer Complaints

Some complaints can be minor while others are more serious. The first step is to always escalate the issue to your manager and see if they can help, otherwise further steps will need to be taken.

### Steps to manage simple problems:

1.  Customer makes a complaint to the business
2.  Business apologizes to the customer and offers to fix the problem
3.  Business offers solution which customer accepts or asks for an alternative solution of equal value
4.  Business works to solve the problem quickly
5.  Customer accepts solution and leaves happy

### Steps to manage more complex problems:

1.  The business is unhelpful and asks the customer for more information. Customer provides more information, paperwork, details of the problem and a clear statement of what they want.
2.  Customer contacts business and informs them that since the matter is not resolved they will be taking it further
3.  Customer seeks advice from a helping agency e.g. Citizens Advice Bureau (CAB)
4.  Customer takes case to Disputes Tribunal or Court
5.  Customer and business go to the Tribunal/Court and the Judge decides what is awarded to the Customer



## Example Workplace Policy for Simulated Scenarios

### Workplace Policy for Customer Service

This policy outlines the standards of customer service expected of all employees within the organization. It establishes guidelines for interactions with customers, including returns and complaints.

#### Customer Service Standards

- **Core Values:** All employees must embody the company's core values of respect, integrity, and customer satisfaction in every interaction.
- **Communication:** Effective communication, both verbal and nonverbal, is essential for understanding customer needs and building relationships.
- **Problem-Solving:** Employees are expected to identify and resolve customer issues promptly and efficiently.
- **Teamwork:** Collaboration with colleagues is essential for providing exceptional customer service.
- **Continuous Improvement:** All employees are encouraged to seek opportunities to enhance customer service practices.

#### Handling Enquiries:

- **Accurate Information:** Ensure all information provided to customers is accurate and up to date. This includes product or service details, company policies, and procedures.
- **Timely Response:** Respond to customer enquiries promptly and efficiently. Establish timeframes for response based on the urgency of the enquiry and communication channel (e.g., immediate response for phone calls, within 24 hours for emails).
- **Problem-Solving:** Approach customer concerns with a problem-solving mindset. Actively listen to complaints, acknowledge their frustrations, and offer solutions according to company protocols.
- **Going the Extra Mile:** Strive to exceed customer expectations whenever possible. This could involve offering additional information, suggesting alternative solutions, or simply being genuinely helpful and attentive to their needs.

#### Returns Policy

- **Eligibility:** Clearly outline which items are eligible for return (e.g., unused, undamaged, with original receipt).
- **Timeframe:** Specify the return window (e.g., 30 days from purchase).
- **Refunds:** Detail the refund process, including methods of refund (cash, credit, store credit) and any applicable fees.
- **Exchanges:** Explain the exchange process, including any conditions or limitations.
- **Faulty Goods:** Outline procedures for returning faulty items, including repairs or replacements.

#### Customer Complaints Policy

- **Complaint Handling:** Describe the process for handling customer complaints, including who to contact and how complaints will be addressed.
- **Timeframes:** Specify the timeframe for acknowledging and resolving complaints.
- **Resolution:** Outline the steps taken to resolve complaints, including apologies, refunds, repairs, or replacements.
- **Consumer Guarantees Act:** We offer refunds, repairs or replacement on a product which does not meet the standard requirements for normal use or is outside of its use by date when purchased. We do require a receipt to initiate this process. If a receipt is not available, we can attempt to locate the purchase in our system with a date and approximate time of the transaction.
- **Escalation:** Describe the process for escalating complaints if necessary.
- **Customer Feedback:** Explain how customer feedback will be used to improve services.

#### Knowledge Base and Resources:

- Staff must possess a strong knowledge base of the company's products, services, policies, and procedures to answer customer enquiries accurately.
- Regularly access and utilise internal resources such as training materials, product manuals, and customer service knowledge bases to stay updated on information.

#### Escalation Procedures:

- In situations where a staff member is unable to resolve a customer enquiry due to insufficient information, technical limitations, or complex issues, a clear escalation procedure should be established.
- This may involve transferring the customer to a supervisor, technical support team, or designated department best equipped to handle the enquiry.



# Assessment Questions

1. Explain how customer service impacts on the following aspects of an organisation. (pc 1.1)

## Profit:

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## Customer Satisfaction:

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## Reputation:

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## Customer Loyalty:

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## Customer Feedback:

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2. Explain how the following interpersonal factors of employees can have an impact on customer service. (pc 1.2)

**Personal Presentation:**

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**Attitude:**

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**Motivation:**

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**Interest:**

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**Responsiveness:**

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**Body Language:**

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**Communication:**

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## Practical Application

To complete the assessment, you are required to provide customer service in two different contexts;

- **Provide customer service** face-to-face or digital/phone.
- **Respond to a customer complaint** face-to-face or digital/phone.

**Assessment can occur in a workplace or in a simulated environment, provided the workplace conditions are closely simulated.**

### YOU WILL NEED TO PROVIDE EVIDENCE OF THE TWO CUSTOMER INTERACTIONS:

**You can either:**

- Provide a **video of yourself** providing customer service in two different contexts either in a real-life workplace or in a simulated environment. Send the video to your GET Group Tutor as evidence of your participation.

**OR**

- Ask your teacher/manager **to observe you** providing customer service in two different contexts either in a real-life workplace or in a simulated environment. Your teacher/manager will need to complete the attached Observation Form to provide evidence to your GET Group Tutor.

**During the two customer interactions you will be assessed on the following.**

#### **Provide customer service.**

- You greet the customer appropriately including; smiling, polite language, greeting, promptness, personal presentation.
- You demonstrate customer service skills such as; questioning, clarifying, reflective listening.
- You demonstrate an ability to maintain good customer service when dealing with several demands at one time is demonstrated. (*introduce distractions into a simulated scenario*)
- You are able to meet the customers' requirements to their satisfaction, or the customer is referred to more experienced staff.
- You are able to work within the workplace policies and procedures for customer service.

#### **Respond to a customer complaint.**

- You are able to identify the nature of the complaint and reflect this back to the customer.
- You demonstrate customer service skills appropriate for handling a complaint such as active listening, open questioning, follow-up.
- You are able to meet the customers' requirements to their satisfaction, or the customer is referred to more experienced staff.
- You are able to work within the workplace policies and procedures for customer service and dealing with complaints.

**You can use the following scenarios, a real-life situation or you can create your own scenarios.**



## Example Simulation Scenarios

### Activity 1: Provide Customer Service

#### Scenario 1: Retail Customer Service

**Customer:** Approaches the counter with a query about a product. They appear unsure about the product's features and suitability for their needs.

**Distraction:** A colleague urgently needs assistance with a customer complaint at another register.

**TOP TIP:** Use the workplace customer service policy included in the learning material as a guide to manage the customer enquiry.

OR

#### Scenario 2: Call Centre Customer Service

**Customer:** Calls to inquire about a recent order. They are experiencing difficulty tracking the order and are becoming increasingly frustrated.

**Distraction:** A system outage occurs, impacting the ability to access customer information.

**TOP TIP:** Use the workplace customer service policy included in the learning material as a guide to manage the customer enquiry.

### Activity 2: Respond to a Customer Complaint

#### Scenario 1: Retail Environment

**Customer:** Approaches the customer service desk visibly upset about a faulty product purchased the previous day.

**TOP TIP:** Use the workplace customer service policy included in the learning material as a guide to manage the customer complaint.

OR

#### Scenario 2: Call Centre Environment

**Customer:** Calls to complain about a delayed delivery and is demanding a refund.

**TOP TIP:** Use the workplace customer service policy included in the learning material as a guide to manage the customer complaint.

These scenarios will allow the assessor to observe the candidate's ability to handle customer interactions, prioritize tasks, handle customer complaints, follow workplace procedures and maintain a high level of customer service even under pressure.



# Learner Observations: Unit Standard 57

*This form is to be completed by an industry expert/approved assessor to confirm the learner has met the evidence requirements for the unit standard.*

UNIT STANDARD No: 57 – Version 11

LEVEL: 2 / CREDITS: 3

UNIT STANDARD TITLE: Provide Customer Service

## EVIDENCE FOR LEARNING OUTCOMES

I have observed the learner **providing customer service** in accordance with the requirements of the unit standard in either;

- ☐ A real-life context using naturally occurring evidence
- ☐ A realistic simulated environment relevant to the candidate which requires performance equivalent to the real-life context

Assessment date:

## Guidance Notes:

1. This unit standard can be assessed against in a simulated situation. This refers to a situation that reflects some elements of commercial realism, but the candidate must be under time pressure.
2. *Customer service* refers to any action taken to meet customer needs and expectations in relation to provision of goods or services.  
*Workplace* refers to a place of paid or voluntary employment.  
*Workplace requirements* refer to documented policies and procedures or established protocols for workplace performance and may include but are not limited to – any legal requirements, standards, codes of practice, company and/or site procedures, and any industry best-practice documents.
3. All assessment tasks are to be carried out in accordance with workplace requirements.

Learning Outcome 2: Provide customer service	Assessor Notes/Comments
<p><b>PC 2.1 Customer is greeted.</b> <b>Please tick those which apply.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> The learner followed the workplace requirements for customer service standards.</li><li><input type="checkbox"/> The learner smiled and responded in a timely manner to the customer.</li><li><input type="checkbox"/> The learner was professional and courteous.</li><li><input type="checkbox"/> The learner communicated clearly and concisely.</li><li><input type="checkbox"/> The learner had a positive tone.</li><li><input type="checkbox"/> The learner used good body language and was presented appropriately.</li></ul> <p><i>Please make comment/notes regarding how the learner greeted customers.</i></p> <p><b>PC 2.2 Skills for customer service are demonstrated.</b> <b>Please tick those which apply.</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> The learner used appropriate questions for the interaction.</li><li><input type="checkbox"/> The learner clarified what the customer was saying.</li></ul>	



- ☐ The learner used reflective and active listening skills.
- ☐ The learner went 'the extra mile'.
- ☐ The learner had a good knowledge base of the product/service.

Please make comment/notes regarding the learner's customer service skills.

**PC 2.3 Ability to maintain customer service level when dealing with several demands at one time is demonstrated.**

Please tick those which apply.

- ☐ The learner was able to manage distractions appropriately.
- ☐ The learner was able to problem solve.

Please make comment/notes regarding the learner's ability to manage distractions and demands.

**PC 2.4 Customer requirements are met to customer satisfaction or customer is referred to more experienced staff.**

Please tick those which apply.

- ☐ The learner met the customers' requirements
- ☐ The learner knew when/how to escalate the issue.

Please make comment/notes regarding the learner's ability to meet customer expectations and escalations when required.

**Learning Outcome 3: Respond to a customer complaint.**

**Assessor Notes/Comments**

**PC 3.1 The nature of customer's complaint is identified.**

- ☐ The learner followed the workplace requirements for dealing with customer complaints.
- ☐ The learner reflected to the customer what the complaint was about.

Please make comment/notes regarding how the learner identified the nature of the complaint.

**PC 3.2 Skills for handling customer's complaint are demonstrated.**

- ☐ The learner used active listening skills.
- ☐ The learner used open questions to gain more understanding.
- ☐ The learner was able to problem solve.
- ☐ The learner ensured the customers' needs were met.





- ☐ The learner followed up at the end of the interaction to ensure the customer was satisfied with the outcome.

Please make comment/notes regarding the learner's skills handling customer complaints.

**PC 3.3 Customer's complaint is met to customer satisfaction or customer is referred to more experienced staff.**

- ☐ The learner met the customers' requirements
- ☐ The learner knew when/how to escalate the issue

Please make comment/notes regarding the learner's ability to meet customer expectations and escalations when required.

**Further Evidence**

**Please note the further evidence required (if applicable)**

- ☐ **COMPETENT.** The learner has met the requirements of the practical assessment.
- ☐ **NOT YET COMPETENT.** Further evidence is required for the practical assessment.

**TO BE SIGNED AFTER THE PRACTICAL ASSESSMENT & OBSERVATIONS ARE COMPLETED.**

I declare that the practical assessment for this unit standard has been completed by the learner which demonstrates their understanding of the unit standard requirements. This concludes the practical requirements for this unit standard.

Full Name of Observer: \_\_\_\_\_

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

# ASSESSMENT RESULTS FORM



## Individual Unit Standard 57 – Level 2

Learner name: .....

School/Agency: .....

Learner NZQA NSN: ..... Date of Birth: .....

### LEARNER DECLARATION: to be signed on completion.

I declare that the evidence provided is my own work and I have completed it to the best of my ability.

Learner signature: ..... Date: .....

### GET Group USE ONLY: Assessor complete. Feedback/Resubmission Requirements (if any)

Resubmission Required? (please specify if required)

☐ Yes

☐ No

Reassessments Date: ..... Assessment Completion Date: .....  
(if applicable)

Level	US	Description	Credits	Version
1	57	Provide Customer Service	2	11
Result 57:		Achieved / Not Yet Achieved		

### ASSESSOR DECLARATION

The Learner named above has achieved competence in the specified unit standards.

Assessor name: .....

Assessor Signature: ..... Date: .....