

Course Outline

Marketing, Sales, and Service

REVISED: August/2017

Job Title:

Customer Service Representative

Career Pathway:

Professional Sales

Industry Sector:

Marketing, Sales, and Service

O*NET-SOC CODE:

43-4051.00

CBEDS Title:

Customer Service

CBEDS No.:

4119

71-60-50

Customer Service Representative

Credits: 5

Hours: 60

Course Description:

This competency-based course prepares students in providing customer services to a variety of industry and/or company environments. This course contains instruction in assessing individual work styles and identifying effective work behaviors; identifying and building personal/interpersonal skills to sustain employment; strengthening thinking and problem solving in the workplace, and identifying work site employment. Instruction of business related oral and written communication skills (customer face-to-face interaction, effective telephone skills) is also included. An introduction to the fundamentals of customer service and customer service representative job-readiness skills is provided. The competencies in this course are aligned with the California High School Academic Content Standards and the California Career Technical Education Model Curriculum Standards.

Prerequisites:

Enrollment requires a minimum of 8.0 reading level as measured by the TABE D 9/10 test.

NOTE: For Perkins purposes this course has been designated as an **concentrator/capstone** course.

This course cannot be repeated once a student receives a Certificate of Completion.



COURSE OUTLINE COMPETENCY-BASED COMPONENTS

A course outline reflects the essential intent and content of the course described. Acceptable course outlines have six components. (Education Code Section 52506). Course outlines for all apportionment classes, including those in jails, state hospitals, and convalescent hospitals, contain the six required elements:

(EC 52504; 5CCR 10508 [b]; Adult Education Handbook for California [1977], Section 100)

COURSE OUTLINE COMPONENTS

LOCATION

GOALS AND PURPOSES

Cover

The educational goals or purposes of every course are clearly stated and the class periods are devoted to instruction. The course should be broad enough in scope and should have sufficient educational worth to justify the expenditure of public funds.

The goals and purpose of a course are stated in the COURSE DESCRIPTION. Course descriptions state the major emphasis and content of a course, and are written to be understandable by a prospective student.

PERFORMANCE OBJECTIVES OR COMPETENCIES

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Objectives should be delineated and described in terms of measurable results for the student and include the possible ways in which the objectives contribute to the student's acquisition of skills and competencies.

Performance Objectives are sequentially listed in the COMPETENCY-BASED COMPONENTS section of the course outline. Competency Areas are units of instruction based on related competencies. Competency Statements are competency area goals that together define the framework and purpose of a course. Competencies fall on a continuum between goals and performance objectives and denote the outcome of instruction.

Competency-based instruction tells a student before instruction what skills or knowledge they will demonstrate after instruction. Competency-based education provides instruction which enables each student to attain individual goals as measured against pre-stated standards.

Competency-based instruction provides immediate and continual repetition and In competency-based education the curriculum, instruction, and assessment share common characteristics based on clearly stated competencies. Curriculum, instruction and assessment in competency-based education are: explicit, known, agreed upon, integrated, performance oriented, and adaptive.

COURSE OUTLINE COMPETENCY-BASED COMPONENTS

(continued)

COURSE OUTLINE COMPONENTS

LOCATION

INSTRUCTIONAL STRATEGIES

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Instructional techniques or methods could include laboratory techniques, lecture method, small-group discussion, grouping plans, and other strategies used in the classroom.

Instructional strategies for this course are listed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructional strategies and activities for a course should be selected so that the overall teaching approach takes into account the instructional standards of a particular program, i.e., English as a Second Language, Programs for Adults with Disabilities.

UNITS OF STUDY, WITH APPROXIMATE HOURS ALLOTTED FOR EACH UNIT

Cover

The approximate time devoted to each instructional unit within the course, as well as the total hours for the course, is indicated. The time in class is consistent with the needs of the student, and the length of the class should be that it ensures the student will learn at an optimum level.

pp. 7-14

Units of study, with approximate hours allotted for each unit are listed in the COMPETENCY AREA STATEMENT(S) of the course outline. The total hours of the course, including work-based learning hours (community classroom and cooperative vocational education) is listed on the cover of every CBE course outline. Each Competency Area listed within a CBE outline is assigned hours of instruction per unit.

EVALUATION PROCEDURES

p. 17

The evaluation describes measurable evaluation criteria clearly within the reach of the student. The evaluation indicates anticipated improvement in performances as well as anticipated skills and competencies to be achieved.

Evaluation procedures are detailed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructors monitor students' progress on a continuing basis, assessing students on attainment of objectives identified in the course outline through a variety of formal and informal tests (applied performance procedures, observations, and simulations), paper and pencil exams, and standardized tests.

REPETITION POLICY THAT PREVENTS PERPETUATION OF STUDENT ENROLLMENT

Cover

After a student has completed all the objectives of the course, he or she should not be allowed to reenroll in the course. There is, therefore, a need for a statement about the conditions for possible repetition of a course to prevent perpetuation of students in a particular program for an indefinite period of time.

ACKNOWLEDGMENTS

Thanks to ALEJANDRA SALCEDO for developing and editing this course outline. Acknowledgment is also given to ERICA ROSARIO for designing the original artwork for the course covers.

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CALIFORNIA CAREER TECHNICAL EDUCATION MODEL CURRICULUM STANDARDS

Marketing, Sales, and Services Industry Sector Knowledge and Performance Anchor Standards

1.0 Academics

Analyze and apply appropriate academic standards required for successful industry sector pathway completion leading to postsecondary education and employment. Refer to the Marketing, Sales, and Services academic alignment matrix for identification of standards

2.0 Communications

Acquire and accurately use Marketing, Sales, and Services sector terminology and protocols at the career and college readiness level for communicating effectively in oral, written, and multimedia formats.

3.0 Career Planning and Management

Integrate multiple sources of career information from diverse formats to make informed career decisions, solve problems, and manage personal career plans.

4.0 Technology

Use existing and emerging technology to investigate, research, and produce products and services, including new information, as required in the Marketing, Sales, and Services sector workplace environment.

5.0 Problem Solving and Critical Thinking

Conduct short, as well as more sustained, research to create alternative solutions to answer a question or solve a problem unique to the Marketing, Sales, and Services sector using critical and creative thinking, logical reasoning, analysis, inquiry, and problem-solving techniques.

6.0 Health and Safety

Demonstrate health and safety procedures, regulations, and personal health practices and determine the meaning of symbols, key terms, and domain-specific words and phrases as related to the Marketing, Sales, and Services sector workplace environment.

7.0 Responsibility and Flexibility

Initiate and participate in a range of collaborations demonstrating behaviors that reflect personal and professional responsibility, flexibility, and respect in the Marketing, Sales, and Services sector workplace environment and community settings.

8.0 Ethics and Legal Responsibilities

Practice professional, ethical, and legal behavior, responding thoughtfully to diverse perspectives and resolving contradictions when possible, consistent with applicable laws, regulations, and organizational norms.

9.0 Leadership and Teamwork

Work with peers to promote divergent and creative perspectives, effective leadership, group dynamics, team and individual decision making, benefits of workforce diversity, and conflict resolution as practiced in the DECA career technical student organization

10.0 Technical Knowledge and Skills

Apply essential technical knowledge and skills common to all pathways in the Marketing, Sales, and Services sector, following procedures when carrying out experiments or performing technical tasks.

11.0 Demonstration and Application

Demonstrate and apply the knowledge and skills contained in the Marketing, Sales, and Services anchor standards, pathway standards, and performance indicators in classroom, laboratory and workplace settings, and through the DECA career technical student organization.

Marketing, Sales, and Services Pathway Standards

A. Marketing Pathway

Using both creative and systems processes, develop marketing concepts and principles and their practical application in marketing and management. Subject matter includes market research, economics, marketing budgets, creative development and design, and marketing foundations/functions with emphasis on public relations, advertising, branding, promotion, product/service management, pricing and distribution. Specialized programs of study in this field may include sports marketing, hospitality marketing, advertising or market research.

Sample occupations associated with this pathway:

- ◆ Advertising Account Representative
- ◆ Advertising Sales Manager
- ◆ Market Research Analyst
- ◆ Marketing Manager
- ◆ Public Relations Specialist

- A1.0 Demonstrate an understanding of business fundamentals, uses and application of technologies, communications, and basic management functions.
- A2.0 Demonstrate an understanding of basic economic concepts, economic systems, cost-profit relationships, economic indicators and trends, as well as international concepts.
- A3.0 Demonstrate the importance of legal, ethical and financial issues in business marketing decisions.
- A4.0 Implement the concepts, systems, and tools needed to gather, access, synthesize, evaluate, and disseminate information for use in making business marketing decisions.
- A5.0 Demonstrate an understanding of the nature and scope of the product/service management function, quality assurance, product mix, positioning, and other market product considerations.
- A6.0 Demonstrate an understanding of the concepts and processes needed to move, store, locate, and/or transfer ownership of goods and services.
- A7.0 Demonstrate an understanding of product and institutional promotion through: advertising, publicity/public relations, promotional sales, e-commerce, using product, services, images and ideas to achieve a desired outcome.
- A8.0 Demonstrate an understanding of the process of establishing and communicating the value or cost of goods and services, the nature and scope of pricing concepts, and the strategies and outcomes of pricing.

CBE
Competency-Based Education

COMPETENCY-BASED COMPONENTS
for the Customer Service Representative Course

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>A. ORIENTATION/INTRODUCTION AND SAFETY</p> <p>Understand the goals of the course and the relationship of developing effective customer service skills to employability.</p> <p>(2 hours)</p>	<ol style="list-style-type: none"> Describe the scope and purpose of the course. Identify and list personal goals for course. Identify course competency areas. Compare personal goals with the goals of the course. Demonstrate an understanding of classroom policies and procedures. Establish goals for self-improvement and further education/training. Describe the value of developing effective customer service skills. Identify the types of businesses that employ frontline service (customer service) providers. Describe the technical skills, policy knowledge, and interpersonal skills required of all frontline employees. Describe the relationship between skilled customer service representation and a business' positive public image. Define customer service as a lifelong partnership between company and customer. Describe the importance of customer service as a means of attracting and keeping customers. Describe personal experiences with businesses that utilize effective customer service procedures (effective telephone skills, friendly and responsive face-to-face encounters, thorough follow-up, etc.). Define ergonomics as it applies to customer service. Describe and demonstrate sound ergonomic practices in organizing one's workspace. Describe causes, effects, and preventive measures for repetitive strain injuries. Describe and demonstrate correct scanning, cashiering techniques and posture. Pass the safety test with 100% accuracy. 	<p>Career Ready Practice: 1, 4, 5</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.5, 2.6 Career Planning and Management: 3.1 Problem Solving and Critical Thinking: 5.4 Health and Safety: 6.3</p> <p>CTE Pathway: B3.3</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>B. WORK STYLE</p> <p>Understand the relationship between personality/temperament type and work style, and identify effective work behaviors.</p> <p>(3 hours)</p>	<ol style="list-style-type: none"> Describe the relationship between personality types and work styles. Define by example a variety of workplace personality types (i.e., assertive, friendly, intellectual, emotional, etc.). Define by example a variety of work styles (i.e., driven, amiable, analytical, expressive, etc.). Identify the work style traits that are conducive/detrimental to productive work habits. Identify personal work style through self-appraisal or standardized assessment (i.e., Kiersey-Bates Temperament Sorter, etc.). Describe results of self-appraisal and formulate strategies to maximize effective work habits. Describe results of self-appraisal and determine if traits are conducive to careers that rely on effective customer service skills. 	<p>Career Ready Practice: 2, 9</p> <p>CTE Anchor: Communications: 2.3, 2.5 Responsibility and Flexibility: 7.3 Leadership and Teamwork: 9.2</p> <p>CTE Pathway: B4.1</p>
<p>C. SUSTAINING EMPLOYMENT</p> <p>PERSONAL SKILLS</p> <p>Understand how personal skill development - including positive attitude, honesty, self-confidence, time management, and other positive traits - affect employability.</p>	<ol style="list-style-type: none"> Describe the relationship between effective life skills and good work habits. Describe the relationship between good work habits and effective time management skills. Define work ethic and explain the importance of ethical standards and social responsibility in the workplace environment. Describe the following traits of a successful customer service representative and describe representative behavior: <ol style="list-style-type: none"> positive attitude/maintains a healthy self-concept self-confidence/considers risks honesty/integrity perseverance self-management/work ethic pride in product/work dependability/punctuality Define personal hygiene and identify acceptable workplace attire. Differentiate between personal time pressures and problems and work-related responsibilities. Explain the balance between work and family and identify personal strategies for achieving and maintaining a balance. Identify personal stressors and formulate strategies (time-management, goal-setting, establishing priorities) to alleviate and control stress. 	<p>Career Ready Standards: 2, 3, 5, 6, 7, 8, 9</p> <p>CTE Anchor: Communications: 2.2, 2.5 Career Planning and Management: 3.1, 3.2, 3.4 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Health and Safety: 6.6 Responsibility and Flexibility: 7.2, 7.4, 7.7 Ethics and Legal Responsibilities: 8.3</p> <p>CTE Pathway: B2.4, B3.4, B3.5, B3.6, B4.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>INTERPERSONAL SKILLS IN THE WORKPLACE</p> <p>Understand principles of effective interpersonal skills in the workplace environment, including group dynamics, conflict resolution and negotiation.</p>	<ol style="list-style-type: none"> 9. Establish goals for personal development, family life, leisure time, volunteerism, health, and further education/training. 10. Recognize effective communication patterns and develop skills that enhance professional relationships: <ol style="list-style-type: none"> a. compare and contrast assertive, aggressive, and passive communication styles b. identify barriers to effective communication in the workplace c. list ways to improve basic skills of listening and communicating d. identify non-verbal communication clues and state their meaning e. present a positive image through verbal and nonverbal communication and understanding the power of body language in communication f. recognize and describe some cultural differences in communication styles g. describe communication patterns which demonstrate respect h. demonstrate ability to communicate effectively with persons of diverse backgrounds 11. Identify and discuss behaviors of an effective team. 12. Explain the central importance of mutual respect in workplace relations. 13. Describe and demonstrate strategies for conflict resolution and negotiation, and explain their importance within the business environment: <ol style="list-style-type: none"> a. analyze situations that may create conflict and develop methods for productively dealing with conflict b. separate personalities from problems c. invent options that are acceptable for both sides d. base agreements on what is fair 14. Describe laws that apply to sexual harassment in the workplace, and identify tactics for handling harassment situations. 15. Work cooperatively, share responsibilities, accept supervision, and assume leadership roles. 16. Demonstrate cooperative working relationships and proper etiquette across gender and cultural groups. 	

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>THINKING AND PROBLEM SOLVING IN THE WORKPLACE</p> <p>Understand the importance of critical thinking and problem solving in the workplace.</p> <p>WORKSITE EMPLOYMENT ISSUES</p> <p>Identify employment guideline and rules.</p> <p>(16 hours)</p>	<p>17. Exhibit critical and creative thinking skills and logical reasoning skills, and employ these skills for problem solving:</p> <ol style="list-style-type: none"> work as a team member in solving problems diagnose the problem, its urgency, and its causes identify alternatives and their consequences explore possible solutions compare/contrast the advantages and disadvantages of alternatives determine appropriate action(s) implement action(s) evaluate results of action(s) taken <p>18. Define workplace requirements and relationship to successful employment.</p> <p>19. Describe the value of a mentor-mentee relationship and establishing a supportive relationship.</p> <p>20. Identify the opportunities available in other areas of the company</p> <p>21. Describe the need to demonstrate the ability to handle greater responsibilities.</p> <p>22. Identify job performance evaluation criteria.</p> <p>23. Interpret daily work schedules and changes in schedules.</p> <p>24. Use accepted procedures for calling in late or sick.</p> <p>25. Identify employer policies for time-keeping, holidays, vacations, sick-leave and overtime.</p> <p>26. Identify acceptable reasons for tardiness, absences, and requesting time off.</p> <p>27. Identify and observe employer policies on worksite visits and personal telephone calls.</p> <p>28. Define equal employment opportunity.</p> <p>29. Identify employee benefits.</p> <p>30. Describe employee civil rights.</p> <p>31. Define gross pay, net pay, state/federal deductions; income tax, SDI, FICA, and SS.</p> <p>32. Identify W-2 and W-4 forms.</p>	
<p>D. ORAL AND WRITTEN COMMUNICATION SKILLS</p> <p>Understand principles of effective communication.</p>	<ol style="list-style-type: none"> Demonstrate active listening through oral and written feedback. Demonstrate proper etiquette in workplace communications. Identify the chain of command in the workplace and understand the importance of following it. Use standard pronunciation, diction, vocabulary, and grammar in verbal communication. Describe how the public perceives a business by the manner in which its representatives answer telephone calls, transfer calls, and take messages. 	<p>Career Ready Practice: 2</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.4, 2.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(10 hours)	<ol style="list-style-type: none"> 6. Demonstrate the following procedures when answering a business telephone: <ol style="list-style-type: none"> a. answer the telephone with an appropriate greeting b. identify yourself and company c. describe when it is appropriate to place a customer on hold d. role-play what to say and demonstrate how to place a customer on hold e. describe when it is appropriate to transfer a call f. role-play what to say and demonstrate how to transfer a call g. describe when to take a message h. explain a co-worker's absence in a positive manner i. describe the procedures for taking a telephone message accurately 7. Take a message which includes: <ol style="list-style-type: none"> a. correct spelling of the customer's first and last name b. correct phone number, including area code c. brief message why the customer called d. time and date the customer called 8. Demonstrate ending a call. 9. Read and follow written instructions. 	<p>Technical Knowledge and Skills: 10.1</p> <p>CTE Pathway: B3.3, B4.2</p>
<p>E. FUNDAMENTALS OF CUSTOMER SERVICE</p> <p>Understand the fundamentals of effective customer service.</p>	<ol style="list-style-type: none"> 1. Define customer perceptions and how they form the basis of "good" customer service. 2. Describe customer service as a problem-solving interaction. 3. Describe customer service as a method of building permanent relationships between the organization and the customer. 4. Describe the basic needs of a customer (i.e., friendliness, understanding and empathy, fairness, control, options and alternatives, and information) and identify needs with different businesses and occupations. 5. Identify the three parts of a customer service transaction: greet, listen, and evaluate. 6. Role-play greeting techniques. 7. Role-play listening and evaluating techniques. 8. Describe techniques for responding to customers. 9. Describe the following behaviors of successful customer services representatives and provide examples of how these behaviors could be demonstrated: <ol style="list-style-type: none"> a. be on time b. under promise and over deliver c. offer your customer options d. treat your customers as the most important part of your job e. give the customer your name and phone number 	<p>Career Ready Practice: 2</p> <p>CTE Anchor: Communications: 2.1, 2.3, 2.5 Technical Knowledge and Skills: 10.1 Demonstration and Application: 11.1</p> <p>CTE Pathway: B4.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(20 hours)	<ul style="list-style-type: none"> f. follow-up on your promises g. go the extra mile h. express empathy i. treat your co-workers as customers j. smile and use inflection on the phone <p>10. Describe the importance of a positive attitude by the service representative.</p> <p>11. Role-play the following ten positive customer service messages:</p> <ul style="list-style-type: none"> a. "I'll find out." vs. "I don't know." b. "What I can do is..." vs. "No." c. "This is who can help you..." vs. "That's not my job." d. "I understand your frustration." e. "Let's see what we can do about this." vs. "That's not my fault." f. "I can help you." vs. "You need to talk to my manager." g. "I'll try my best." vs. "I don't know." h. "I'm sorry." vs. "Calm down." i. "I'll be with you in a moment." vs. "I'm busy right now." j. "I will call you back" vs. "Call me back." <p>12. Describe explainable and acceptable reasons for saying, "No" to a customer.</p> <p>13. Differentiate between the "Hard No" and the "Service No."</p>	
<p>F. STRATEGIES FOR HANDLING IRATE CUSTOMERS</p> <p>Understand and practice strategies for addressing an irate customer's concerns.</p>	<ul style="list-style-type: none"> 1. Demonstrate the following strategies for dealing with an irate customer: <ul style="list-style-type: none"> a. rephrase customer's statements b. acknowledge the customer's feelings c. state the company's position d. ask questions and confirm answers e. find mutually acceptable solutions 2. Describe the three degrees of customer anger a customer service representative may encounter (i.e., controlled anger, expressed anger and irrational anger). 3. Describe the following strategies used to deal with an irate customer: <ul style="list-style-type: none"> a. controlled anger <ul style="list-style-type: none"> i. rephrase the customer's statement ii. respect the customer as a person iii. state one's position iv. confront the customer with possible consequences b. expressed anger <ul style="list-style-type: none"> i. acknowledge the customer's feelings 	<p>Career Ready Practice: 2, 5</p> <p>CTE Anchor: Communications: 2.1, 2.2, 2.3, 2.4, 2.5 Problem Solving and Critical Thinking: 5.2, 5.4 Technical Knowledge And Skills: 10.1 Demonstration and Application: 11.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(5 hours)	<ul style="list-style-type: none"> ii. explain how the customer's behavior affects you iii. ask questions c. listen to answers irrational anger <ul style="list-style-type: none"> i. give the customer the opportunity to vent emotions ii. acknowledge the customer's emotions iii. make a firm, positive statement iv. have the customer make decisions v. give the customer the possible consequences of his or her behavior 4. Describe techniques for overly busy situations. 5. Describe techniques for correcting errors. 6. Describe techniques for handling persistent or eccentric customers. 7. Participate in role playing activities that demonstrate effective strategies for dealing with an irate and/or dissatisfied customer. 8. Observe class members' role playing activities that demonstrate effective strategies for dealing with an irate and/or dissatisfied customer and provide constructive criticism. 	CTE Pathway: B3.4, B3.5, B3.6
G. EMPLOYABILITY SKILLS Understand career paths and strategies for obtaining employment in the customer service field of employment.	<ul style="list-style-type: none"> 1. Define the career planning process. 2. Explain how career planning increases the probability of career success. 3. Explain how career planning enhances self-satisfaction. 4. Describe the decision-making process. 5. Explain why decision-making is continuous and both a conscious and an unconscious process. 6. Describe categories of career requirements in the customer service field. 7. Explore career opportunities and projected trends; investigate required education, training, and experience; and develop an individual education plan. 8. Identify steps for setting goals and writing personal goals and objectives. 9. Examine aptitudes related to career options, relate personal characteristics and interests to educational and occupational opportunities. 10. Develop a career portfolio, including the following documents: <ul style="list-style-type: none"> a. Job application b. Resume(s) c. Appropriate cover and follow up correspondence 	Career Ready Practice: 2, 3 CTE Anchor: Communications: 2.5 Career Planning and Management: 3.1, 3.4, 3.9 Demonstration and Application: 11.5 CTE Pathway: B3.1, B3.2, B3.3

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(4 hours)	11. Develop a career portfolio, including the following documents: <ul style="list-style-type: none"> a. job application b. résumé(s) c. appropriate cover and follow-up correspondence 12. Identify and demonstrate effective interviewing techniques.	

SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES

TEXTBOOKS

Customer Service

Anderson, Kristin. Great Customer Service on the Telephone. AMACOM, 2010.

Anderson, Zemke, Carol J. Kerr and Roger A. Formisano. Customer Relationship Management. McGraw-Hill Companies, 2001.

Bacal, Robert. Perfect Phrases for Customer Service: Hundreds of Tools, Techniques, and Scripts for handling Any Situation, McGraw-Hill Companies, 2005.

Evenson, Renee. Customer Service Training 101: Quick and Easy Techniques that Get Great Results. AMACOM, 2005.

Leland, Karen F. and Keith F. Bailey. Customer Service in an Instant: 60 Ways to Win Customers and Keep Them Coming Back. Career Press Incorporated, 2008.

Maxwell, Dorothy A. Phone Skills for the Information Age, 3rd Edition. McGraw-Hills Companies, 2005.

Morgan, Rebecca L. Calming Upset Customers: Stay in Control in Any Situation, 4th Edition. Crisp Publications, 2009.

Business Etiquette

Cooper, Ann A. The Professional Image. Cengage Learning, 2002.

Greenleaf, Clinton T. A Gentleman's Guide to Etiquette. Adams Media Corporation, 2001.

Pearson Christine and Christine Porath. The Cost of Bad Behavior: How Incivility Is Damaging Your Business and What to Do About It. Penguin Group (USA), 2009.

Sabath, Ann Marie. Business Etiquette, 3rd Edition: 101 Ways to Conduct Business with Charm and Savvy. Career Press, 2010.

Work Style

Bolles, Richard N. What Color is Your Parachute? 2010: A Practical Manual for Job-Hunters and Career-Changers. Ten Speed Press, 2009.

Lore, Nicholas. The Pathfinder: How to Choose or Change Your Career for a Lifetime. Simon & Schuster Adult, 2009.

Tieger, Paul D. and Barbara Barron-Tieger. Do What You Are: Discover the Perfect Career for You Though the Secrets of Personality Type, 4th Edition. Little, Brown and Company, 2007.

RESOURCES

Employer Advisory Board members

CDE Model Curriculum Standards for Marketing, Sales, and Services

<http://www.cde.ca.gov/ci/ct/sf/documents/mktsaleservices.pdf>

COMPETENCY CHECKLIST

TEACHING STRATEGIES and EVALUATION

METHODS AND PROCEDURES

- A. Lecture
- B. Demonstration
- C. Individualized Instruction
- D. Multimedia Presentations
- E. Peer teaching
- F. Cooperative learning opportunities
- G. Guest Lecturers
- H. Critical thinking and listening activities
- I. Role-playing activities

EVALUATION

SECTION A – Orientation/Introduction and Safety – Pass a safety test with a score of 100%.

SECTION B – Work Style – Pass all assignments and exams on work style with a minimum score of 80% or higher.

SECTION C – Sustaining Employment– Pass all assignments and exams on sustaining employment with a minimum score of 80% or higher.

SECTION D – Oral and Written Communication Skills – Pass all assignments and exams on oral and written communication skills with a minimum score of 80% or higher.

SECTION E – Fundamentals of Customer Service – Pass all assignments and exams on fundamentals of customer service with a minimum score of 80% or higher.

SECTION F –Strategies for Handling Irate Customers – Pass all assignments and exams on strategies for handling irate customers with a minimum score of 80% or higher.

SECTION G –Employability Skills – Pass all assignments and exams on employability skills with a minimum score of 80% or higher.

TEACHER TIPS

- A. Simplicity is best for teaching software applications. Avoid the temptation to give too much detail and to teach everything at once.
- B. In an open-entry/open-exit class, it is best to start a new student in an application rather than allowing him/her to search the latest Windows environment. Periodically conduct a group session on Windows so that there is less chance for students to experiment on their own and delete portions of the program.
- C. Challenge your students by providing exercises that relate to real business cases.
- D. Teach spreadsheet before word processing. It is a less “typing intensive” application and usually requires more teacher assistance. This inspires group discussion and new students of varying typing abilities can work together. The students are then more able to continue independently with the other software applications.
- E. Encourage peer help. When continuing students assist new trainees, they have the opportunity to review a process and to practice verbal skills necessary for employment interviewing.
- F. Teach flexibility – new software versions come on the market daily. Emphasize that students will be learning a “process” rather than specific software. When students find that you, too, do not know everything, they tend to be less afraid of the computer and begin to learn more rapidly.
- G. Use discussion of something like the Internet to bring groups together once a week for lecture and discussion. Class interaction and socialization are necessary to maintain interest and attendance.
- H. Allow an advanced student (early completer) to “test drive” new software programs and textbooks so that you can keep current with new teaching materials and programs.
- I. Teach your students how to perform a procedure – do not do it for them.
- J. Reinforce skills by providing students with summary tests at the end of each application.
- K. Teach “on your feet” not “from your seat;” speak with and check each student’s progress a minimum of two times each hour.

Statement for Civil Rights

All educational and vocational opportunities are offered without regard to race, color,
national origin, gender, or physical disability.
