

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

78-35-50

Customer Service

Credits: 5

Hours: 90

Course Description:

This competency-based course is designed for customer service. It provides students with project-based learning experiences in customer care for a variety of industry and/or business environments. Technical instruction includes an orientation, workplace safety policies and procedures, business math, employability skills, and work styles. Emphasis is placed on communication and critical thinking skills, fundamental customer service strategies, cross-selling and upselling strategies, techniques on how to handle irate customers, and strategies required to sustain employment. 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 reading level of 8.0 as measured by the TABE D 9/10.

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

Sections designated by an asterisk (*) contain competencies that meet the National Retail Federation (NRF) Foundation's National Professional Certification in Customer Service. The said competencies are designed to capture the core customer service duties for a broad range of entry-level positions across the sales and service industries.

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

pp. 7-17

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

p. 20

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. 7-17

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

pp. 20-21

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 curriculum. 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

B. Professional Sales Pathway

Develop knowledge and skills in the theory and practice of sales designed to provide a professional foundation to those involved in personal selling careers, including the fundamentals of personal selling with an emphasis on customer behavior, persuasive presentation of ideas, products and services, and developing sales goals.

Sample occupations associated with this pathway:

- ◆ Customer Service Representative
- ◆ Retail Salesperson
- ◆ Sales Manager
- ◆ Real Estate Broker
- ◆ Fashion buyer

- B1.0 Understand the interrelationships between economic and marketing concepts and selling.
- B2.0 Analyze and evaluate legal, moral, and ethical issues affecting selling and sales management.
- B3.0 Analyze customer/client behavior in the selling process.
- B4.0 Understand the nature and scope of the functions associated with personal and business sales strategies, product knowledge, support activities, and management of selling techniques.
- B5.0 Examine different types of sales pathways.
- B6.0 Analyze the support activities of sales staff and management.
- B7.0 Complete a strategic plan that includes establishing individual and company sales goals to guide the activities of the sales staff.
- B8.0 Access and use marketing information to enhance sales opportunities and activities.

CBE
Competency-Based Education

COMPETENCY-BASED COMPONENTS
for the Customer Service Course

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>A. ORIENTATION AND SAFETY</p> <p>Understand, apply, and evaluate classroom and workplace policies and procedures used in accordance with federal, state, and local safety and environmental regulations.</p> <p>(2 hours)</p>	<ol style="list-style-type: none"> Describe the scope and purpose of the course. Describe the overall course content as a part of the Linked Learning Initiative. Describe classroom policies and procedures. Describe the importance of prioritizing work. Describe classroom and workplace first aid and emergency procedures. Describe the different occupations in the Marketing, Sales and Service Industry. Describe the opportunities available for women in the customer service field. Describe the purpose of the California Occupational Safety and Health Administration (Cal/OSHA) and its laws governing customer service representatives. Describe software copyright laws as they pertain to customer service. 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. Describe the benefits of periodic breaks to stretch and relax. Describe and demonstrate a variety of stretches involving the wrists, neck and shoulders. Pass the safety test with 100% accuracy. 	<p>Career Ready Practice: 1, 2, 3, 5, 6, 12</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.5, 2.6 Career Planning and Management: 3.1, 3.4, 3.5 Problem Solving and Critical Thinking: 5.4 Health and Safety: 6.3, 6.7 Ethics and Legal Responsibilities: 8.8 Responsibility and Flexibility: 7.2</p> <p>CTE Pathway: B2.1, B2.2, B2.3, B2.4</p>
<p>B. BUSINESS MATH</p> <p>Understand, apply, and evaluate the basic mathematical principles and procedures required in customer service.</p>	<ol style="list-style-type: none"> Describe and demonstrate reading and writing numbers in words and figures using accurate place values. Describe and demonstrate the procedures for rounding off whole numbers. Describe and demonstrate the procedures for adding whole numbers to find the sum. Describe and demonstrate the procedures for subtracting whole numbers to find the difference. Describe solving word problems using problem-solving steps. 	<p>Career Ready Practice: 1, 2, 5</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
	<ol style="list-style-type: none"> 6. Describe the procedures for rounding off decimals. 7. Learn the numeric keyboard on the calculator and apply addition, subtraction, and decimal procedures. 8. Compute money problems using addition, subtraction, and decimals. 9. Describe and demonstrate the procedures for multiplying whole numbers to find the product. 10. Describe and demonstrate the procedures for dividing whole numbers to find the quotient. 11. Multiply and divide numbers that contain decimals. 12. Learn the numeric keyboard on the calculator and apply multiplication and division procedures. 13. Compute multiplication and division of decimal and money problems. 14. Solve multiplication and division word problems using the problem-solving steps. 15. Identify the parts of a fraction. 16. Describe the different types of fractions. 17. Convert improper fractions to whole or mixed numbers, mixed numbers to improper fractions, common fractions to decimals, and decimals to fractions. 18. Reduce common fractions to lowest terms. Solve fraction word problems using the problem-solving steps. 19. Solve fraction word problems using the problem-solving steps. 20. Describe and demonstrate the conversion of percents to decimals. 21. Describe and demonstrate the conversion of decimals to percents. 22. Describe and demonstrate the conversion of common fractions to percents. 23. Describe and demonstrate the conversion of percents to common fractions. 24. Find the percentage in a mathematical problem when given the rate and the base. 25. Find the rate in a mathematical problem when given the percentage and base. 26. Find the base in a mathematical problem when given the percentage and rate. 27. Calculate percentage of increase and decrease problems. 28. Distinguish between increase and decrease problems. 29. Figure percentage distribution problems. 30. Solve percentage word problems using the problem-solving steps. 31. Describe how to estimate reasonable answers to problems before solving them. 32. Retrieve information from a postage rate table, a payroll deduction table, and a sales table to solve problems. 33. Complete a cash report by counting coins and currency. 34. Use the current federal income tax table to identify withholding tax for employees. 	<p>Problem Solving and Critical Thinking: 5.4</p> <p>Demonstration and Application: 11.1</p> <p>CTE Pathway: B3.6</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(5 hours)	35. Solve word problems relating to measurements and tables. 36. Read and interpret data from a line graph, a bar graph, and a pie graph. 37. Define the following: a. mean b. median c. mode 38. Solve word problems relating to graphs. 39. Observe and report on how customer service representatives solve problems in pricing differences that influence the customer to: a. select a product for purchase b. commit to buy a product c. close/finalize the sale d. follow up with other purchases	
C. COMMUNICATION SKILLS Understand, apply, and evaluate principles and practices used in effective communication.	1. Define communication. 2. Describe the following stages of the communication process: a. sending/source: i. reason for sending the message ii. content of the message b. message c. encoding: i. avoid cultural issues ii. eliminate mistaken assumptions iii. fill in missing information d. channel: i. face-to-face meetings ii. telephone and videoconferencing iii. written channels including letters, emails, memos and reports e. decoding - the time to read a message carefully or listen actively to it f. receiving g. feedback - verbal and nonverbal reactions to the communicated message h. context: i. surrounding environment ii. broader culture (corporate culture, international cultures, etc.) 3. Describe and demonstrate the following techniques to remove barriers in communication: a. using clear verbal and body language to avoid confusion b. being mindful of the demands on other people's time c. conversing and delivering the message to people of different backgrounds and cultures	Career Ready Practice: 2 CTE Anchor: Communications: 2.1, 2.2, 2.5 CTE Pathway: B2.4, B3.3, B3.4, B3.5, B3.6, B4.3

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(10 hours)	<ol style="list-style-type: none"> 4. Demonstrate active listening through oral and written feedback. 5. Demonstrate proper etiquette in workplace communications. 6. Identify the chain of command in the workplace and understand the importance of following it. 7. Use standard pronunciation, diction, vocabulary, and grammar in verbal communication. 8. Describe how the public perceives a business by the manner in which its representatives answer telephone calls, transfer calls, and take messages. 9. Demonstrate the following procedures when answering a business telephone: <ol style="list-style-type: none"> a. answering the telephone with an appropriate greeting b. identifying yourself and the company c. placing a customer on hold d. transferring a call e. taking a message f. explaining a co-worker's absence in a positive manner g. taking a telephone message accurately by: <ol style="list-style-type: none"> i. correctly spelling the customer's first and last name ii. correctly noting phone number, including area code iii. briefly noting the customer's message iv. correctly noting the time and date the customer called h. ending a call 10. Read and follow written instructions. 11. Research and create a table showing how a customer service representative demonstrate effective communication strategies with: <ol style="list-style-type: none"> a. a customer b. a fellow worker c. a supervisor 12. Research and create a table showing how a customer service representative demonstrate effective communication strategies with the end goals of: <ol style="list-style-type: none"> a. making the sale b. implementing a sales strategy c. implementing a follow-up plan 	
<p>D. CRITICAL THINKING SKILLS</p> <p>Understand, apply, and evaluate principles and practices used to promote critical thinking skills.</p>	<ol style="list-style-type: none"> 1. Identify and describe the steps and procedures involved in defining and clarifying issues or problems. 2. Describe the importance of the following attributes in judging information related to problem-solving: <ol style="list-style-type: none"> a. consistency b. logic c. unbiased d. unemotional e. credibility 	<p>Career Ready Practice: 1, 2, 5, 11</p> <p>CTE Anchor: Communications: 2.5 Problem Solving and Critical Thinking: 5.1, 5.3, 5.4</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
	<ol style="list-style-type: none"> 3. Describe the importance of determining the adequacy of information to justify a conclusion and to predict probable consequences. 4. Describe and demonstrate the following affective techniques used to sharpen student critical thinking skills: <ol style="list-style-type: none"> a. developing insight into egocentricity or socio-centricity b. exercising fair mindedness c. exploring thoughts underlying feelings and feelings underlying thoughts d. developing intellectual humility and suspending judgment e. developing intellectual courage f. developing intellectual good faith or integrity g. developing intellectual perseverance h. developing confidence in reason 5. Describe the following macro-cognitive techniques used to sharpen student critical thinking skills: <ol style="list-style-type: none"> a. refining generalizations and avoiding oversimplifications b. comparing analogous situations: transferring insights to new contexts c. developing one's perspective: creating or exploring beliefs, arguments, or theories d. clarifying issues, conclusions, or beliefs e. clarifying and analyzing the meanings of words or phrases f. clarifying issues, conclusions, or beliefs g. clarifying and analyzing the meanings of words or phrases h. developing criteria for evaluation: clarifying values and standards i. evaluating the credibility of sources of information j. questioning deeply: raising and pursuing root or significant questions k. analyzing or evaluating arguments, interpretations, beliefs, or theories l. generating or assessing solutions m. analyzing or evaluating actions or policies n. reading critically: clarifying or critiquing texts o. listening critically: the art of silent dialogue p. making interdisciplinary connections q. practicing Socratic discussion: clarifying and questioning beliefs, theories, or perspectives r. reasoning dialogically: comparing perspectives, interpretations, or theories s. reasoning dialectically: evaluating perspectives, interpretations, or theories 6. Describe the following micro-cognitive techniques used to sharpen student critical thinking skills: <ol style="list-style-type: none"> a. comparing and contrasting ideals with actual practice b. thinking precisely about thinking: using critical vocabulary c. noting significant similarities and differences d. examining or evaluating assumptions e. distinguishing relevant from irrelevant facts 	<p>CTE Pathway: B2.4, B3.3, B3.4, B8.3</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(5 hours)	<ul style="list-style-type: none"> f. making plausible inferences, predictions, or interpretations g. evaluating evidence and alleged facts h. recognizing contradictions i. exploring implications and consequences <p>7. Research and create a table showing how customer service representatives demonstrate critical thinking skills when dealing with the following:</p> <ul style="list-style-type: none"> a. a customer b. a fellow worker c. a supervisor 	
<p>E. WORK STYLES</p> <p>Understand, apply, and evaluate personality/temperament types and how they impact work styles/behaviors.</p> <p>(3 hours)</p>	<ul style="list-style-type: none"> 1. Describe the following workplace personality types: <ul style="list-style-type: none"> a. assertive b. friendly c. intellectual d. emotional 2. Describe the traits of the following work styles: <ul style="list-style-type: none"> a. driven b. amiable c. analytical d. expressive 3. Identify and describe the work style traits that are conducive to productive work habits. 4. Identify and describe the work style traits that are detrimental to productive work habits. 5. Identify and record personal work style through self-appraisal or standardized assessment (i.e., Kiersey-Bates Temperament Sorter, etc.). 6. Describe and record results of self-appraisal and formulate strategies to maximize effective work habits. 7. Describe and record results of self-appraisal and determine if traits are conducive to careers that rely on effective customer service skills. 8. Research and create tables showing the work style and personal habits of the following: <ul style="list-style-type: none"> a. a customer service representative b. a customer c. a supervisor 	<p>Career Ready Practice: 2</p> <p>CTE Anchor: Communications: 2.3, 2.5 Problem Solving and Critical Thinking: 5.4 Leadership and Teamwork: 9.1, 9.2, 9.3</p> <p>CTE Pathway: 2.1, 2.2, 2.5, 3.1, 3.2, 6.6, 7.2, 7.3</p>
<p>F. FUNDAMENTALS OF CUSTOMER SERVICE</p> <p>Understand, apply, and evaluate the principles and procedures used in effective customer service.</p>	<ul style="list-style-type: none"> 1. Define: <ul style="list-style-type: none"> a. customer service b. positive messages c. negative messages 2. Identify and describe the following: <ul style="list-style-type: none"> a. customer perceptions and how they form the basis of “good” customer service 	<p>Career Ready Practice: 2</p> <p>CTE Anchor: Communications: 2.1, 2.3, 2.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
	<ul style="list-style-type: none"> b. customer service as a problem-solving interaction c. customer service as a method of building permanent relationships between the organization and the customer d. basic customer needs: <ul style="list-style-type: none"> i. being addressed in a friendly manner ii. being shown understanding and empathy iii. being dealt with in a fair manner iv. being in control v. having options and alternatives vi. receiving accurate and relevant information e. special customer needs based on his/her business and occupation f. parts of an interaction: <ul style="list-style-type: none"> i. greeting ii. listening iii. evaluating 3. Describe and demonstrate the following: <ul style="list-style-type: none"> a. greeting techniques b. listening techniques c. evaluating techniques 4. Describe and demonstrate the following customer service strategies of successful employees: <ul style="list-style-type: none"> a. prompt attention to customer b. under promising and over delivering c. offering options d. treating customers as the most important part of one's job e. giving the customer your name and contact number f. following-up on one's promises g. going the extra mile h. expressing empathy i. treating co-workers as customers j. exhibiting positive attitude k. smiling and using inflection on the phone 5. Role-play the following ten positive customer service messages: <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>Ethics and Legal Responsibilities: 8.8</p> <p>CTE Pathway: B4.1, B8.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(25 hours)	6. Describe explainable and acceptable reasons for saying, “No” to a customer. 7. Differentiate between the “Hard No” and the “Service No.” 8. Research and create tables showing how a customer service representative demonstrates the following strategies: <ol style="list-style-type: none"> greeting, listening, and evaluating techniques delivering positive customer service messages smiling and using inflection on the phone 	
G. CROSS-SELLING Understand, apply, and evaluate the cross-selling strategies. (10 hours)	1. Define cross-selling. 2. Describe and demonstrate the following cross-selling techniques: <ol style="list-style-type: none"> identifying the value of the original purchase/order bridging the original purchase/order of the customer to a complementary product/service pointing out the benefits of the complementary products/services asking the customer to buy the complementary products/services 3. Research and create a table showing how customer service representatives demonstrate cross-selling strategies.	Career Ready Practice: 2 CTE Anchor: Communications: 2.5 Problem Solving and Critical Thinking 5.4 Demonstration and Application: 11.1 CTE Pathway: B1.2, B3.6
H. UPSELLING Understand, apply, and evaluate the upselling strategies. (10 hours)	1. Define upselling. 2. Describe and demonstrate the following upselling techniques. <ol style="list-style-type: none"> identifying the value of the original purchase/order pointing out the savings and other benefits of a higher quality product/service to the customer asking the customer to buy the higher quality product/service 3. Research and create a table showing how customer service representatives demonstrate upselling strategies.	Career Ready Practice: 2 CTE Anchor: Communications: 2.5 Problem Solving and Critical Thinking: 5.4 Demonstration and Application: 11.1 CTE Pathway: B1.2, B3.6

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>I. HANDLING IRATE CUSTOMERS</p> <p>Understand, apply, and evaluate the strategies for addressing an irate customer's concerns.</p> <p>(10 hours)</p>	<ol style="list-style-type: none"> Describe and demonstrate the following strategies for dealing with an irate customer: <ol style="list-style-type: none"> rephrasing customer's statements acknowledging the customer's feelings stating the company's position asking questions and confirm answers finding mutually acceptable solutions Identify and describe manifestations of a customer's anger to a customer service representative based on the following degrees of anger: <ol style="list-style-type: none"> controlled anger expressed anger irrational anger Describe and demonstrate the following strategies used to deal with an irate customer: <ol style="list-style-type: none"> controlled anger <ol style="list-style-type: none"> rephrasing the customer's statement respecting the customer as a person stating one's position confronting the customer with possible consequences expressed anger <ol style="list-style-type: none"> acknowledging the customer's feelings explaining how the customer's behavior affects you asking questions listening to answers irrational anger <ol style="list-style-type: none"> giving the customer the opportunity to vent emotions acknowledging the customer's emotions making a firm, positive statement having the customer make decisions giving the customer the possible consequences of his or her behavior Describe and demonstrate the following strategies used to deal with an irate customer: <ol style="list-style-type: none"> overly busy situations correcting errors handling persistent or eccentric customers handling customers who felt taken advantage of by cross-selling or upselling Participate in role playing activities that demonstrate effective strategies for dealing with an irate and/or dissatisfied customer. Research and create a table showing how a customer service representative demonstrates the following: <ol style="list-style-type: none"> dealing with an irate and/or dissatisfied customer handling overly busy situations correcting errors handling persistent or eccentric customers handling customers who felt taken advantage of by cross-selling or upselling 	<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 Responsibility and Flexibility: 7.2 Ethics and Legal Responsibilities: 8.8 Demonstration and Application: 11.1</p> <p>CTE Pathway: B3.4, B3.5, B3.6</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>J. EMPLOYABILITY SKILLS</p> <p>Understand, apply, and evaluate the employability skills required in customer service.</p> <p>(5 hours)</p>	<ol style="list-style-type: none"> Describe employer requirements for the following: <ol style="list-style-type: none"> punctuality attendance attitude toward work quality of work teamwork timeliness communication skills computer skills and software applications Identify potential employers through traditional and internet sources. Describe the role of electronic social networking in job search. Design sample résumés and cover letters. Describe the importance of filling out a job application legibly, with accurate and complete information. Complete sample job application forms correctly. Describe the importance of enthusiasm on a job. Describe the importance of appropriate appearance on a job. Describe and demonstrate appropriate interviewing techniques. Videotape and critique a mock interview. Identify the informational materials and resources needed to be successful in an interview. Design sample follow-up letters. Describe and demonstrate appropriate follow-up procedures. 	<p>Career Ready Practice: 2</p> <p>CTE Anchor: Career Planning and Management: 3.1, 3.4, 3.9</p>
<p>K. SUSTAINING EMPLOYMENT</p> <p>Understand, apply, and evaluate the skills required to sustain employment in the customer service field.</p>	<p>PERSONAL SKILLS</p> <ol style="list-style-type: none"> Describe the following: <ol style="list-style-type: none"> relationship between effective life skills and good work habits relationship between good work habits and effective time management skills importance of ethical standards and social responsibility in the workplace environment importance of personal hygiene and acceptable workplace attire importance of balancing personal time pressures and problems and work-related responsibilities strategies for achieving and maintaining a balance in personal and work life goals for personal development, family life, leisure time, volunteerism, health, and further education/training <p>INTERPERSONAL SKILLS IN THE WORKPLACE</p> <ol style="list-style-type: none"> Describe and demonstrate the following: <ol style="list-style-type: none"> effective communication patterns that enhance professional relationships improving basic skills of listening and communicating 	

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(5 hours)	<ul style="list-style-type: none"> c. exhibiting behaviors of an effective team member by working cooperatively, sharing responsibilities, and accepting supervision d. mastering strategies for conflict resolution and negotiation, and explain their importance within the business environment e. following laws that apply to sexual harassment in the workplace and tactics for handling harassment situations f. assuming leadership roles when needed and appropriate g. demonstrating cooperative working relationships and proper etiquette across gender and cultural groups <p>THINKING AND PROBLEM-SOLVING IN THE WORKPLACE</p> <p>3. Describe and demonstrate the following:</p> <ul style="list-style-type: none"> a. working as a team member in solving problems b. diagnosing the problem, its urgency, and its causes c. identifying alternatives and their consequences d. exploring possible solutions e. comparing/contrasting the advantages and disadvantages of alternatives f. determining appropriate action(s) g. implementing action(s) h. evaluating results of action(s) taken <p>WORKSITE EMPLOYMENT ISSUES</p> <p>4. Describe the importance of the following:</p> <ul style="list-style-type: none"> a. mentor-mentee relationship and establishing a supportive relationship b. demonstrating the ability to handle greater responsibilities c. meeting job performance evaluation criteria 	

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. Lectures and discussions
- B. Demonstrations and participation
- C. Multimedia Presentations
- D. Individualized Instruction
- E. Peer teaching
- F. Role-playing
- G. Guest Lecturers
- H. Field trips and field study experiences
- I. Projects

EVALUATION

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

SECTION B – Business Math – Pass all assignments and exams on business math with a minimum score of 80% or higher.

SECTION C – Communication Skills– Pass all assignments and exams on communication skills with a minimum score of 80% or higher.

SECTION D– Critical Thinking Skills– Pass all assignments and exams on critical thinking skills with a minimum score of 80% or higher.

SECTION E – Work Styles – Pass all assignments and exams on work styles with a minimum score of 80% or higher.

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

SECTION G – Cross-Selling – Pass all assignments and exams on cross-selling with a minimum score of 80% or higher.

SECTION H – Upselling – Pass all assignments and exams on upselling with a minimum score of 80% or higher.

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

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

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

Statement for Civil Rights

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