

# Appendix C: Final Assessment

## Customer Script for Phone Call Role Play Assessment

This role play is designed to assess how the learner absorbed the information in the Call Center Customer Service Delivery training as well as how the learner can translate the information into practical skills in the workplace. The assessor will read the script and portray a customer who is interacting with the learner. The learner will respond to the customer, and his/her responses will be evaluated using the role play assessment rubric. Please read the entire script before beginning the assessment because there are cues listed in brackets after each prompt.

[Customer initiates the phone call. The learner answers the call.]

**Customer:** Hello? Can you hear me? Sometimes I have a hard time hearing on this new telephone. It's a piece of junk, and I should have returned it to the company but it was too much of a hassle.

*[Allow the learner time to greet you using the greeting criteria. Be sure not to prompt him/her to correctly greet you, but you can acknowledge his/her greeting. You can give your own name or use the customer name Pat Smith if you choose.]*

**Customer:** I called you today because I want to talk about an order I made two weeks ago. At least, I think it was two weeks ago.

*[This is intended to prompt the learner to ascertain the reason for the call. Provide time for him/her to ask leading questions. If this does not happen, proceed to the next statement.]*

**Customer:** I bought one Everloving Evergreen Wreath out of the Complete Christmas Décor Package from your company about two weeks ago. I wasn't expecting much, but it is really nice. I want to buy another one for my friend. She actually might like a nicer one, but you know, I'll take what I can get at this point.

*[This is a prompt for the learner to offer to sell you a special value or better version of the product (i.e. upsell). If the learner does initiate an upsell, allow him/her to convince you to buy the more expensive item. Let him/her give you as much information about the product and price as he/she offers. If he/she offers you a bulk rate on multiple items or a special value, accept the offer.*

*Give the learner the personal information on page 3 as your personal information during the ordering process.*

*After the order has been processed, proceed to the next prompt.]*

**Customer:** Hey, now that I have that taken care of, I have another issue I want you to help me with. I want to know when you're going to have the new ceramic version of the plastic Children's Hoppity Easter Bunny Statue in stock. I called a week ago, and the person who answered the phone couldn't help me. That person acted like that information didn't even exist! But I know it's in that place somewhere. Someone must know.

*[The goal of this prompt is to have the learner access resources for information he/she does not have. He/she will need to place the call on hold and ask a supervisor for the information or check the product catalog update memo. Allow the learner to place the call on hold if they initiate this action. If the learner does not offer to find the information for you, proceed to the next prompt.]*

**Customer:** Oh, yeah, I have something else to take care of while I'm on the phone with you. I bought a Simply Silver Earring and Pin Set from your company. Not from you--someone else sold it to me. I tried three times to tell this person I wanted a Golly Gee Gold Earring and Pin Set, but no one ever listens to me. Well, I got the Simply Silver Set instead, and I hate it. I want to return it, and I want my money back. And after you do that, I want you to transfer me to the person who sold it to me so I can give a customer satisfaction survey for them. You have their name on the computer, I know it.

*[This prompt has two goals: the learner should handle a return properly and transfer a call properly. They should occur in that order. If the learner attempts to do them in the opposite order, allow him/her to proceed. During the return, provide the learner with the information on page 3 as your return order information. Prior to the assessment, the learner will have been given an extension to transfer the call to by a training facilitator.]*

*[If the call is disconnected, wait for the facilitator to restore the call and proceed to the next statement. If the call is transferred successfully, wait for the facilitator to restore the call and proceed to the next prompt.]*

**Customer:** Well, I guess you've done all you can for me. I hope you've done everything right this time so I don't have to call back. I do like your stuff though. My friends like it too.

*[The final prompt is intended to allow the learner to close the call using the appropriate closing criteria. Allow the learner to proceed and disconnect the call after he/she has concluded the closing.]*

### **Customer Personal Information**

Name: [You may use your own name or the customer name Pat Smith]

Address: 3418 Northaven Road, Apt. 34B, Navasota, TX 76588

Phone number: 555-838-2236

Credit card: Visa 4111111111111111

Exp. date: 12/2016

Code: 211

Name on card: [Your name or Pat Smith]

Zip code: 76588

Requested shipping speed: Expedited

Return order information:

Item: Simply Silver Earring and Pin Set

Date ordered: 01/01/2015

Price: \$17.99

Credit card: see above

Order completed by PJ customer satisfaction representative Lee Lewis

Reason for return: "I wish I had bought another version of the product instead."

## Scoring Rubric for Phone Call Role Play Assessment

<b>Task</b>	<b>Emerging (0 points)</b>	<b>Proficient (1 point)</b>	<b>Score</b>
Answering the call	The learner does not answer the customer's call before the required time period expires.	The learner answers the customer's call before the required time period expires.	
Greeting the customer	The learner does not fulfill the greeting criteria (greet the customer, announce the company name, state his/her name, or ask "How can I help you today?").	The learner fulfills the greeting criteria (greet the customer, announce the company name, state his/her name, or ask "How can I help you today?").	
Identifying the reason for the call	The learner does not ask the customer the reason for the call and/or does not initiate the appropriate steps to resolve the reason for the call.	The learner asks the customer the reason for the call and initiates the appropriate steps to resolve the reason for the call.	
Taking the customer's order	The learner does not obtain and enter the customer's order correctly into the ordering system.	The learner obtains and enters the customer's order into the ordering system with no errors.	
Handling special value items and upsells	The learner does not offer the customer special value items or offer to upsell an item during the call.	The learner offers the customer special value items or an upsell during the call.	
Accessing resources and information to assist customer/answer customer questions	The learner does not access any resources or information when required during the call.	The learner accesses appropriate resources and information when required during the call.	
Seeking assistance while customer is on the phone	The learner does not seek assistance from a supervisor during the call even though assistance is warranted.	The learner seeks assistance from a supervisor during the call when the assistance is warranted.	
Handling a dissatisfied customer	The learner does not take any of the appropriate actions when presented with a dissatisfied customer on a call.	The learner completes all of the appropriate actions when presented with a dissatisfied customer on a call.	
Placing the call on hold	The learner does not ask the customer's permission for the hold and/or does not place the call on hold and/or inadvertently disconnects the call during the procedure and/or leaves the call on hold past the required time limit.	The learner asks the customer for permission for the hold and places the call on hold correctly and re-establishes the call before the required time limit expires.	

<b>Task</b>	<b>Emerging (0 points)</b>	<b>Proficient (1 point)</b>	<b>Score</b>
Transferring the call	The learner does not ask the customer's permission for the transfer and/or does not transfer the call during the required time limit and/or transfers the call to the wrong number and/or inadvertently disconnects the call during the procedure.	The learner asks the customer's permission for the transfer and transfers the call to the correct number before the required time limit expires.	
Handling a return	The learner does not take the appropriate actions to handle a customer's return.	The learner takes the appropriate actions to handle a customer's return.	
Closing the call	The learner does not ask the customer if he/she needs further assistance and/or does not thank the customer and/or does not correctly disconnect the call.	The learner asks the customer if he/she needs further assistance and initiates the correct steps to assist the customer and thanks the customer and correctly disconnects the call.	
Maintaining the appropriate tone during the call	The learner does not maintain the appropriate tone (smile in the voice) throughout the call.	The learner maintains the appropriate tone (smile in the voice) throughout the call.	
Establishing rapport with the customer	The learner does not use the customer's name and/or listen to the customer.	The learner uses the customer's name as appropriate during the call and spends the appropriate amount of time listening to the customer.	
Overall score:			