**Competency-Based iPLA Guide: Customer Service**

1. **Overview**

**How to Use this Guide**

This guide is meant to help you understand the knowledge and competencies typically expected of someone who has a college-level understanding of Customer Service. This guide is also meant to help you go through the processes of thinking about your learning and competencies in preparation for writing your Prior Learning Request.  Respond to the activity prompts by drawing from your own experience and using the short scenarios provided to discuss how you would approach each situation.

The activity prompts in this guide act as a worksheet to help you identify and describe your learning. The rubric at the end can help you both formulate your responses and assess your learning. Once you have completed all of the competency activities and assessed that you have college-level knowledge in this area, you will compile a more formal iPLA request, incorporating your responses to the competency activities.

**PLA Process**

When you are ready, compile your responses into a learning description to create a more formal iPLA request. Once you complete your learning description, submit it to your mentor for review before you submit your iPLA request to PLA Planner, which initiates the evaluation process.

The college will assign an evaluator to your iPLA request. The evaluator uses two sources to assess your learning: 1) your learning description/iPLA request, which you develop from your answers to this worksheet, with any appropriate supporting evidence, and 2) an interview.

The evaluator asks questions to help clarify and verify your knowledge and to gain a better understanding of the depth and breadth of your learning. The evaluator may ask about possible redundancies between a particular credit request and other studies that are listed on your degree program. The evaluator also may suggest changes in the title of your learning components, the number of credits, the level of learning, or liberal arts and sciences credit designations. Once your interview is complete, the evaluator will write a recommendation which is posted in PLA Planner.

To learn more about the evaluation process, please talk to your mentor and read the college’s iPLA guide at <https://www.esc.edu/degree-planning-academic-review/prior-learning-assessment/individualized-prior-learning-assessment/>

**Overview of Customer Service**

Customer Service is the interaction with customers and clients of a company or organization to provide information in response to inquiries about product and services and handling and resolving complaints.

Outstanding customer service skills include effective listening and communication in interacting with customers, techniques to handle irate, difficult, and demanding customers, resolving conflicts, problem solving skills, developing positive working relationships with other colleagues and gaining a broader understanding of the relationship between customer satisfaction and retention.

Credit is granted for successfully describing theoretical and practical knowledge related to the principles and skills of customer service. Evaluators recommend either introductory- or advanced-level credit based on the breadth and depth of your knowledge.

1. **Competency Worksheet for your iPLA Request**

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| Competency 1: Utilize communications skills in order to provide effective customer service. |
| **Activity 1 Discuss a time when you communicated effectively with a customer and met the customer needs.**  The following are questions for you to consider.   * Describe how you identify customer needs and wants. * Describe a situation where you created a favorable impression with a customer. * Describe your methods of providing customer service to diverse customers. * Describe how you have worked effectively on a customer service team. * Discuss how you recognize the signs of emotional communication (anger, fear, guilt, etc.). * Describe how you establish and maintain interpersonal relationships in the workplace. |

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| Competency 2: Evaluate customer needs and employ appropriate solutions |
| **Activity 2**   * Describe your process for delivering effective customer service. * Provide specific examples of how you have used problem-solving techniques in customer service:   + Analyzing data or information   + Creativity   + Processing information   Describe how you prioritize customer needs and manage your time in a busy work environment. |
| Competency 3: Apply negotiation techniques to resolve customer service issues in the context of company policies and procedures. |
| **Activity 3**   * Describe how you satisfy customer needs and wants that are compatible with company policy. * Discuss how you resolve conflicts and negotiate with others in a customer service context. * Describe a situation when you responded to a customer problem and explain how you resolved it. |

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| Competency 4: Interpret customer service industry standards. |
| **Activity 4**   * Describe the use of industry knowledge in customer service. * Discuss the relationship between customer service and its importance to profitable business operations. * Define the components of proper customer service protocol. * Describe how you have used technology in your customer service industry. * Describe trends in best practices and standards for customer service. |

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| Describe Additional Learning |
| This section is intended to provide you with an opportunity to discuss other learning you may have accomplished that is not already reflected in the Competency prompts.  Please make sure you discuss your learning with your mentor for guidance on how to articulate what you have learned. |

1. **Next Steps**

**Step 1: Compile and Write Your iPLA Request, Based on Responses to Worksheet Activities**

Review and compile all your responses to the activities from the various competency areas into a learning description. Review your learning description with your mentor. From the questions in the guide and the feedback you receive from your mentor, complete your iPLA request.

* Review what you have written and be sure that your learning description conveys your knowledge.
* Re-review the rubric, consider the evaluation criteria, and be sure that your learning description meets or exceeds expectations.
* Consider the feedback you have received from your mentor.
* The final iPLA request should reflect college writing; be sure to proofread what you write before submitting it to PLA Planner.

**Step 2: Prepare for your interview**

After the evaluator has reviewed your request, he or she will conduct an interview with you to gain a more in-depth understanding of your knowledge. You are expected to participate actively in the evaluation process. The evaluator may ask you to demonstrate or elaborate further on your learning. The evaluator needs to be confident that your learning is college level and not redundant with other learning in your degree plan.

Think about questions that the evaluator may want to ask you and think about possible responses that you can provide. The interview process can be interesting and informative. The interview is an opportunity for you to discuss ways in which you have used your knowledge and applied that knowledge in different situations. It can result in an increased understanding of your learning and provide you with new or differing perspectives.

**Rubric for Customer Service**

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| **Competency 1: Utilize communication skills to provide effective customer service** | | | |
| **Demonstrate effective listening skills to hear the customers' needs** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited understanding or use of communication skills | Demonstrates some understanding or use of communication skills | Demonstrates understanding and applied use of communication skills | Demonstrates advanced understanding and applied use of communication skills |
| **Convey solutions in a clear and respectful manner** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited understanding or use of communication skills | Demonstrates some understanding or use of communication skills | Demonstrates understanding and applied use of communication skills | Demonstrates advanced understanding and applied use of communication skills |
| **Respond in a professionally appropriate manner (maintain composure)** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited understanding or use of communication skills | Demonstrates some understanding or use of communication skills | Demonstrates understanding and applied use of communication skills | Demonstrates advanced understanding and applied use of communication skills |
| **Ensure acknowledgement from the customer of services provided** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited understanding or use of communication skills | Demonstrates some understanding or use of communication skills | Demonstrates understanding and applied use of communication skills | Demonstrates advanced understanding and applied use of communication skills |
| **Communicate organizational policies and procedures** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited understanding or use of communication skills | Demonstrates some understanding or use of communication skills | Demonstrates understanding and applied use of communication skills | Demonstrates advanced understanding and applied use of communication skills |
| **Describe technologies used, if applicable** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited understanding or use of communication skills | Demonstrates some understanding or use of communication skills | Demonstrates understanding and applied use of communication skills | Demonstrates advanced understanding and applied use of communication skills |

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| **Competency 2: Evaluate customer needs and employ appropriate solutions** | | | |
| **Define components of proper customer service** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited evidence for evaluating customer needs or appropriate examples of applied learning | Demonstrates some evidence for evaluating customer needs or appropriate examples of applied learning | Evaluates customer needs and ability to determine solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company | Demonstrates the ability to seek out multiple solutions and/or options for the customer.  Determines solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company |
| **Demonstrate appropriate judgment to resolve customer service issues** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited evidence for evaluating customer needs or appropriate examples of applied learning | Demonstrates some evidence for evaluating customer needs or appropriate examples of applied learning | Evaluates customer needs and ability to determine solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company | Demonstrates the ability to seek out multiple solutions and/or options for the customer.  Determines solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company |
| **Research solutions to answers as needed** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited evidence for evaluating customer needs or appropriate examples of applied learning | Demonstrates some evidence for evaluating customer needs or appropriate examples of applied learning | Evaluates customer needs and ability to determine solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company | Demonstrates the ability to seek out multiple solutions and/or options for the customer.  Determines solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company |
| **Prioritize customer needs in a timely manner** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited evidence for evaluating customer needs or appropriate examples of applied learning | Demonstrates some evidence for evaluating customer needs or appropriate examples of applied learning | Evaluates customer needs and ability to determine solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company | Demonstrates the ability to seek out multiple solutions and/or options for the customer.  Determines solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company |
| **Identify tools available to resolve the issue** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited evidence for evaluating customer needs or appropriate examples of applied learning | Demonstrates some evidence for evaluating customer needs or appropriate examples of applied learning | Evaluates customer needs and ability to determine solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company | Demonstrates the ability to seek out multiple solutions and/or options for the customer.  Determines solutions appropriate to the service creatively.  Demonstrates service that resulted in enhanced reputation of the company |

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| **Competency 3: Apply negotiation techniques to resolve customer service issues in the context of company policies and procedures** | | | |
| **Demonstrate problem-solving techniques** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited negotiation techniques.  No reference to company policies and procedures | Demonstrates some application of negotiation techniques to resolve customer services issues.  Demonstrates partial awareness of the context of company policies and procedures | Demonstrates application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution | Demonstrates advanced ability associated with the understanding of the application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution |
| **Distinguish between customer needs and wants** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited negotiation techniques.  No reference to company policies and procedures | Demonstrates some application of negotiation techniques to resolve customer services issues.  Demonstrates partial awareness of the context of company policies and procedures | Demonstrates application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution | Demonstrates advanced ability associated with the understanding of the application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution |
| **Through customer service relations, identify a systemic customer service problem and create a solution that results in a high probability of repeat business** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited negotiation techniques.  No reference to company policies and procedures | Demonstrates some application of negotiation techniques to resolve customer services issues.  Demonstrates partial awareness of the context of company policies and procedures | Demonstrates application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution | Demonstrates advanced ability associated with the understanding of the application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution |
| **Identify customer needs and apply negotiation techniques to resolve issues in the context of company policies and procedures** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited negotiation techniques.  No reference to company policies and procedures | Demonstrates some application of negotiation techniques to resolve customer services issues.  Demonstrates partial awareness of the context of company policies and procedures | Demonstrates application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution | Demonstrates advanced ability associated with the understanding of the application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution |
| **Preserve productive customer relations that maintain goodwill** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Demonstrates limited negotiation techniques.  No reference to company policies and procedures | Demonstrates some application of negotiation techniques to resolve customer services issues.  Demonstrates partial awareness of the context of company policies and procedures | Demonstrates application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution | Demonstrates advanced ability associated with the understanding of the application of negotiation techniques to resolve customer services issues.  Demonstrates problem-solving techniques, provides detail of resolution |

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| **Competency 4: Interpret customer service industry standards** | | | |
| **Demonstrate the relationship between customer service and its importance to profitable business operations** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Cannot identify customer service industry standards | Demonstrates some competency in interpreting customer service industry standards | Demonstrates competency in interpreting customer service industry standards and applying to a customer service setting | Demonstrates advanced competency in interpreting customer service industry standards and applying to a customer service setting |
| **Define components of proper customer service protocol** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Cannot identify customer service industry standards | Demonstrates some competency in interpreting customer service industry standards | Demonstrates competency in interpreting customer service industry standards and applying to a customer service setting | Demonstrates advanced competency in interpreting customer service industry standards and applying to a customer service setting |
| **Describe how you have used technology in your customer service** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Cannot identify customer service industry standards | Demonstrates some competency in interpreting customer service industry standards | Demonstrates competency in interpreting customer service industry standards and applying to a customer service setting | Demonstrates advanced competency in interpreting customer service industry standards and applying to a customer service setting |
| **Identify trends and best practices within a specific industry** | | | |
| **Does not meet** | **Approaches** | **Meets** | **Exceeds** |
| Cannot identify customer service industry standards | Demonstrates some competency in interpreting customer service industry standards | Demonstrates competency in interpreting customer service industry standards and applying to a customer service setting | Demonstrates advanced competency in interpreting customer service industry standards and applying to a customer service setting |