

Course Outline

Marketing, Sales, and Service

REVISED: July/2023

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 Representative

CBEDS No.:

4119

78-35-50

Customer Service

Credits: 5

Hours: 80

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. Instruction includes orientation, safety and ergonomics, fundamentals of customer service, communication and critical thinking skills, understanding work styles, cross-selling and upselling, handling irate customers, and employability skills and resume preparation. 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 7.0 and math level of 6.0 as measured by the CASAS GOALS 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

pp. 7-14

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
<p>INSTRUCTIONAL STRATEGIES</p> <p>Instructional techniques or methods could include laboratory techniques, lecture methods, small-group discussion, grouping plans, and other strategies used in the classroom.</p> <p>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 considers the instructional standards of a particular program, i.e., English as a Second Language, Programs for Adults with Disabilities.</p>	p. 16
<p>UNITS OF STUDY, WITH APPROXIMATE HOURS ALLOTTED FOR EACH UNIT</p> <p>The approximate time devoted to each instructional unit on 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 so that it ensures the student will learn at an optimum level.</p> <p>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) are listed on the cover of every CBE course outline. Each Competency Area listed within a CBE outline is assigned hours of instruction per unit.</p>	Cover pp. 7-14
<p>EVALUATION PROCEDURES</p> <p>The evaluation describes measurable evaluation criteria clearly within the reach of the student. The evaluation indicates anticipated improvement in performance as well as anticipated skills and competencies to be achieved.</p> <p>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.</p>	p. 16
<p>REPETITION POLICY THAT PREVENTS PERPETUATION OF STUDENT ENROLLMENT</p> <p>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.</p>	Cover

ACKNOWLEDGMENTS

Thanks to ELLENA ANDERSON and KARON WRIGHT for developing and editing this curriculum. Acknowledgment is also given to ERICA ROSARIO for designing the original artwork for the course covers.

ANA MARTINEZ
Specialist
Career Technical Education

MATTHEW OBERLANDER
Director, Equity, and Instruction
Division of Adult and Career Education

ROSARIO GALVAN
Administrator
Division of Adult and Career Education

APPROVED:

RENNY NEYRA
Executive Director
Division of Adult and Career Education

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</p> <p>Understand, apply, and evaluate classroom and workplace policies and procedures used in the customer service field.</p> <p>(3 hours)</p>	<ol style="list-style-type: none"> 1. Describe the scope and purpose of the course. 2. Identify, compare, and list personal goals for course. 3. Describe classroom policies and procedures. 4. Explain and recognize the importance of ethics, teamwork, responsibility skills, respecting individual and cultural differences and diversity in the workplace. 5. Describe the importance of prioritizing work. 6. Discuss the opportunities available for promoting gender equity and the representation of non-traditional populations in the industry. 7. Discuss, identify, research, and draw conclusions on the different career paths, occupations, employment outlook, career advancements. 8. Describe the value of developing effective customer service skills when selling/marketing a service/product. 9. Identify the types of businesses that employ frontline service (customer service) providers. 10. Describe and explain client confidentiality, propriety information, software copyright laws as they pertain to customer service. 11. Describe the importance of customer service as a means of attracting and keeping customers. 12. 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.) 	<p>Career Ready Practice: 1, 2, 3, 7, 8, 9, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1 Career Planning and Management: 3.1, 3.2, 3.3, 3.4, 3.5 Responsibility and Flexibility: 7.2 Ethics and Legal Responsibilities: 8.5, 8.6, 8.7, 8.8 Leadership and Teamwork: 9.2, 9.4, 9.6 Technical Knowledge and Skills: 10.2</p> <p>CTE Pathway: B3.3</p>
<p>B. SAFETY AND ERGONOMICS</p> <p>Understand safety procedures and techniques in the customer service field.</p>	<ol style="list-style-type: none"> 1. Discuss classroom and workplace first aid and emergency procedures. 2. Describe the purpose of the California Occupational Safety and Health Administration (Cal/OSHA) and its laws governing customer service representative. 3. Define ergonomics as it applies to customer service. 4. Describe and demonstrate sound ergonomic practices in organizing one’s workspace to include: <ol style="list-style-type: none"> a. causes, effects, and preventive measures for repetitive strain injuries 	<p>Career Ready Practice: 1, 2, 10, 12</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.6</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(3 hours)	<ul style="list-style-type: none"> b. correct scanning, cashiering techniques, and posture c. benefits of periodic breaks to stretch and relax involving wrists, neck, and shoulders d. practice proper lifting, bending, or moving equipment and supplies <p>5. Discuss how each of the following insures a safe workplace:</p> <ul style="list-style-type: none"> a. employees' rights as they apply to job safety b. employees' obligations as they apply to safety c. safety laws applying to tools and equipment d. recognize legal aspects of inappropriate labeling of product/service <p>6. Describe and demonstrate the standards regarding proper use of personal protective equipment.</p> <p>7. Pass the safety test with 100% accuracy.</p>	<p>Health and Safety: 6.2, 6.4, 6.5, 6.7</p> <p>Technical Knowledge and Skills: 10.1, 10.2</p> <p>Demonstration and Application: 11.1</p> <p>CTE Pathway: B2.2</p>
<p>C. 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 customer service. 2. Discuss, identify, and describe the following: <ul style="list-style-type: none"> a. customer perceptions and how they form the basis of customer service: <ul style="list-style-type: none"> i. "good" customer service ii. "bad" customer service iii. "superior" customer service b. parts of an interaction: <ul style="list-style-type: none"> i. greeting ii. listening iii. evaluating c. customer service as a problem-solving interaction d. customer service as a method of building permanent relationships between the organization and the customer e. 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 f. special customer needs based on his/her business and occupation g. customer service delivery methods via phone, in-person, digital (email, online, social media) 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 	<p>Career Ready Practice: 1, 2, 9, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.3, 2.6 Leadership and Teamwork: 9.2, 9.7 Technical Knowledge and Skills 10.1 Demonstration and Application: 11.1, 11.5</p> <p>CTE Pathway: B3.3, B4.3</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(15 hours)	<ul style="list-style-type: none"> 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 <p>5. 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>6. Describe explainable and acceptable reasons for saying, “No” to a customer.</p> <p>7. Define and differentiate between the “Hard No” and the “Service No.”</p> <p>8. Research and create scenario showing how a customer service representative demonstrates the following strategies to assess the level of understanding with an 80% score or higher:</p> <ul style="list-style-type: none"> a. greeting, listening, and evaluating techniques b. delivering positive customer service messages c. smiling and using inflection on the phone 	
<p>D. COMMUNICATION SKILLS</p> <p>Understand, apply, and evaluate principles and practices used in effective communication.</p>	<ul style="list-style-type: none"> 1. Define communication. 2. Define, describe, and discuss the following stages of the communication process: <ul style="list-style-type: none"> a. sending/source: <ul style="list-style-type: none"> i. reason for sending the message ii. content of the message b. message c. encoding: <ul style="list-style-type: none"> i. avoid cultural issues ii. eliminate mistaken assumptions iii. fill in missing information d. channel: <ul style="list-style-type: none"> 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 and determine if messages require upper-level 	<p>Career Ready Practice: 1, 2, 4, 10, 11, 12</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3, 2.4, 2.5 Technology: 4.1, 4.2 Technical Knowledge and Skills: 10.1 Demonstration and Application: 11.1</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(15 hours)	<p>management input</p> <ul style="list-style-type: none"> f. receiving g. feedback - verbal and nonverbal reactions to the communicated message h. context: <ul style="list-style-type: none"> i. surrounding environment ii. broader culture (corporate culture, international cultures, etc.) <ol style="list-style-type: none"> 3. Identify the chain of command in the workplace and understand the importance of following it. 4. Describe and demonstrate the following techniques to remove barriers in communication: <ul style="list-style-type: none"> 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 5. Demonstrate active listening through oral and written feedback: <ul style="list-style-type: none"> a. proofreading for grammar, accuracy, and concise delivery b. ensuring message meets customer's request/needs 6. Demonstrate proper etiquette in workplace communications. 7. Demonstrate the use of standard pronunciation, diction, vocabulary, and grammar in verbal and written 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: <ul 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: <ul 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. Demonstrate procedures providing customer service in a digital format (email or social media). 11. Read and follow written instructions. 12. Research and create a scenario showing how a customer service representative demonstrate effective communication strategies to assess the level of understanding with an 80% score or higher: <ul style="list-style-type: none"> a. a customer b. a fellow worker c. a supervisor 	<p>CTE Pathway: B3.3, B4.1, B4.3</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>E. CRITICAL THINKING SKILLS</p> <p>Understand, apply, and evaluate principles and practices used to promote critical thinking skills.</p> <p>(10 hours)</p>	<ol style="list-style-type: none"> 1. Define and describe critical thinking skills. 2. Identify and describe the steps and procedures involved in identifying barriers, defining, and clarifying issues or problems. 3. 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 4. Describe and demonstrate the importance of determining the adequacy of information to justify a conclusion and to predict probable consequences. 5. Define, describe, and demonstrate the following affective techniques used to sharpen student critical thinking skills: <ol style="list-style-type: none"> a. exercising fair mindedness b. exploring thoughts underlying feelings and feelings underlying thoughts c. developing intellectual humility and suspending judgment d. developing intellectual courage, good faith, or integrity e. developing confidence in reason 6. Define, describe, and demonstrate cognitive techniques used to sharpen student critical thinking skills to make informed decisions: <ol style="list-style-type: none"> a. listen to the customer by analyzing or evaluating arguments, interpretations, beliefs, or theories b. analyze the situation c. clarify to determine root of the problem d. compare and contrast ideals with actual practice e. review actions or policies to determine possible solution f. correct the problem/situation g. explain the outcome process to rectify/solve the problem 7. Research and create a scenario showing how customer service representatives demonstrate critical thinking skills when dealing with the following to assess the level of understanding with an 80% score or higher: <ol style="list-style-type: none"> a. a customer b. a customer service representative c. a fellow worker d. a supervisor 	<p>Career Ready Practice: 1, 2, 5, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Technical Knowledge and Skills: 10.1 Demonstration and Application: 11.1</p> <p>CTE Pathway: B3.3, B3.4, B3.5</p>
<p>F. UNDERSTANDING WORK STYLES</p> <p>Understand, apply, and evaluate personality/temperament types and how they impact work styles/behaviors.</p>	<ol style="list-style-type: none"> 1. Discuss and explain individual and cultural differences and recognize the importance of diversity in the workplace. 2. Define, describe, and discuss the following workplace personality types: <ol style="list-style-type: none"> a. assertive b. friendly c. intellectual d. emotional 	<p>Career Ready Practice: 1, 2, 9, 11</p> <p>CTE Anchor: Academics: 1.0</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(4 hours)	<ol style="list-style-type: none"> 3. Define, describe, and discuss the traits of the following work styles: <ol style="list-style-type: none"> a. driven b. amiable c. analytical d. expressive 4. Identify and describe the work style traits that are conducive and detrimental to productive work habits and teamwork. 5. Discuss and explain teamwork strategies to maximize customer service effectiveness. 6. Define, describe, and record self-appraisal and formulate strategies to maximize effective work habits that are conducive to careers that rely on effective customer service skills. 7. Research and create a scenario showing the work style and personal habits to assess the level of understanding with an 80% score or higher for the following: <ol style="list-style-type: none"> a. a customer service representative b. a customer c. a supervisor 	<p>Communications: 2.1, 2.3</p> <p>Leadership and Teamwork: 9.2, 9.3, 9.6, 9.7</p> <p>Technical Knowledge and Skills: 10.1</p> <p>CTE Pathway: B7.1, B7.2</p>
<p>G. CROSS-SELLING AND UPSELLING</p> <p>Understand, apply, and evaluate the cross-selling and upselling strategies.</p>	<ol style="list-style-type: none"> 1. Define, describe, and demonstrate the following cross-selling techniques: <ol style="list-style-type: none"> a. identifying the value of the original purchase order b. bridging the original purchase/order of the customer to a complementary product/service c. pointing out the benefits of the complementary products/services d. asking the customer to buy the complementary product/service 2. Define, describe, and demonstrate the following upselling techniques: <ol style="list-style-type: none"> a. identifying the value of the original purchase order b. pointing out the savings and other benefits of a higher quality product/service to the customer c. asking the customer to buy higher quality product/service d. Explain and determine what additional information and/or research is required to complete the sale by knowing the products and/or services available 3. Compute money transactions using addition, subtraction, and decimals on a purchase order or invoice to make informed decisions. 4. Complete a cash report by counting coins and currency. 5. Observe and report on how customer service representatives solve problems in pricing differences that influence the customer to: <ol style="list-style-type: none"> a. select a product for purchase b. commit to buy a product c. close/finalize the sale 	<p>Career Ready Practice: 1, 2, 5, 10, 11</p> <p>CTE Anchor: Academics: 1.0</p> <p>Communications: 2.1, 2.3</p> <p>Problem Solving and Critical Thinking 5.1, 5.4</p> <p>Technical Knowledge and Skills: 10.1</p> <p>Demonstration and Application: 11.1</p> <p>CTE Pathway: B3.3, B4.3, B4.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(10 hours)	6. Research and create a scenario showing how customer service representatives demonstrate cross-selling and upselling strategies to assess the level of understanding with an 80% score or higher.	
<p>H. HANDLING IRATE CUSTOMERS</p> <p>Understand, apply, and evaluate the strategies for addressing an irate customer's concerns.</p>	<ol style="list-style-type: none"> 1. Define and identify an irate customer. 2. Define, 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"> a. controlled anger b. expressed anger c. irrational anger 3. Discuss the following situations that lead to an irate customer: <ol style="list-style-type: none"> a. overly busy situations b. correcting errors c. handling persistent or eccentric customers d. handling customers who felt taken advantage of by cross-selling or upselling 4. Describe and demonstrate the following strategies used to deal with an irate customer: <ol style="list-style-type: none"> a. controlled anger <ol style="list-style-type: none"> i. rephrasing the customer's statement ii. respecting the customer as a person iii. stating one's position iv. confronting the customer with possible consequences b. expressed anger <ol style="list-style-type: none"> i. acknowledging the customer's feelings ii. explaining how the customer's behavior affects you iii. asking questions iv. listening to answers c. irrational anger <ol style="list-style-type: none"> i. giving the customer the opportunity to vent emotions ii. acknowledging the customer's emotions iii. making a firm, positive statement iv. having the customer make decisions v. giving the customer the possible consequences of his or her behavior 5. Participate in role playing activities that demonstrate effective strategies for dealing with an irate and/or dissatisfied customer. 6. Research and create a scenario showing how a customer service representative demonstrates the following to assess the level of understanding with an 80% score or higher: <ol style="list-style-type: none"> a. dealing with an irate and/or dissatisfied customer b. handling overly busy situations c. correcting errors d. handling persistent or eccentric customers e. handling customers who felt taken advantage of by cross-selling or upselling 	<p>Career Ready Practice: 1, 2, 5, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communications: 2.1, 2.2, 2.3 Problem Solving and Critical Thinking: 5.1, 5.2, 5.3, 5.4 Technical knowledge and Skills: 10.1 Demonstration and Application: 11.1</p> <p>CTE Pathway: B3.4, B3.5, B3.6</p>
(10 hours)		

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>I. EMPLOYABILITY SKILLS AND RESUME PREPARATION</p> <p>Understand, apply, and evaluate the employability skills and resume preparation required in customer service.</p> <p>(10 hours)</p>	<ol style="list-style-type: none"> 1. Understand and define employer requirements for soft skills such as: <ol style="list-style-type: none"> a. attitude toward work b. communication and collaboration c. critical thinking, problem solving, and decision-making d. customer service e. diversity in the workplace f. flexibility and adaptability g. interpersonal skills h. leadership and responsibility i. punctuality and attendance j. quality of work k. respect, cultural and diversity differences l. teamwork m. time management n. trust and ethical behavior o. work ethic 2. Create/revise a resume, cover letter and/or portfolio. 3. Demonstrate, analyze, research, and review the role of online job searching platforms and career websites to make informed decisions. 4. Understand the importance of assessing social media account content for professionalism. 5. Demonstrate and complete and/or review an on-line job application. 6. Understand and demonstrate interview skills to get the job: <ol style="list-style-type: none"> a. do's and don'ts for job interviews b. how to dress for the job 7. Demonstrate and create sample follow-up letters. 8. Understand the importance of the continuous upgrading of job skills as it relates to: <ol style="list-style-type: none"> a. certification, licensure, and/or renewal b. professional organizations/events c. industry associations and/or organized labor 	<p>Career Ready Practice: 1, 2, 3, 4, 5, 7, 8, 9, 10, 11</p> <p>CTE Anchor: Academics: 1.0 Communication: 2.1, 2.3, 2.4, 2.5 Career Planning and Management: 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.8 Technology: 4.1, 4.2 Problem Solving and Critical Thinking: 5.1, 5.4 Responsibility and Flexibility: 7.2, 7.3, 7.4, 7.5, 7.7 Ethics and Legal Responsibilities: 8.3, 8.4, 8.5, 8.6 Leadership and Teamwork: 9.1, 9.2, 9.3, 9.4, 9.6, 9.7 Technical Knowledge and Skills: 10.1 Demonstrate and Application: 11.1, 11.2, 11.5</p> <p>CTE Pathway: B4.1</p>

SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES

TEXTBOOKS

Humphrey, Doris D., P.H.D., Customer Service 21st Century, 2nd Edition, Cengage Learning, 2002

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 – Pass all assignments with a minimum score of 80% or higher.

SECTION B – Safety and Ergonomics – Pass the safety test with 100% accuracy.

SECTION C – Fundamentals of Customer Service– Pass all assignments and exams with a minimum score of 80% or higher.

SECTION D– Communication Skills– Pass all assignments and exams with a minimum score of 80% or higher.

SECTION E – Critical Thinking Skills – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION F –Understanding Work Styles – Pass all assignments and exams with a minimum score of 80% or higher.

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

SECTION H – Handling Irate Customers – Pass all assignments and exams with a minimum score of 80% or higher.

SECTION I –Employability Skills and Resume Preparation – Pass all assignments and exams with a minimum score of 80% or higher.

Standards for Career Ready Practice

1. Apply appropriate technical skills and academic knowledge.

Career-ready individuals readily access and use the knowledge and skills acquired through experience and education. They make connections between abstract concepts with real-world applications and recognize the value of academic preparation for solving problems, communicating with others, calculating measures, and performing other work-related practices.

2. Communicate clearly, effectively, and with reason.

Career-ready individuals communicate thoughts, ideas, and action plans with clarity, using written, verbal, electronic, and/or visual methods. They are skilled at interacting with others: they are active listeners who speak clearly and with purpose, and they are comfortable with terminology that is common to workplace environments. Career-ready individuals consider the audience for their communication and prepare accordingly to ensure the desired outcome.

3. Develop an education and career plan aligned with personal goals.

Career-ready individuals take personal ownership of their educational and career goals and manage their individual plan to attain these goals. They recognize the value of each step in the educational and experiential process, and they understand that all career paths require ongoing education and experience to adapt to practices, procedures, and expectations of an ever-changing work environment. They seek counselors, mentors, and other experts to assist in the planning and execution of education and career plans.

4. Apply technology to enhance productivity.

Career-ready individuals find and maximize the productive value of existing and new technology to accomplish workplace tasks and solve workplace problems. They are flexible and adaptive in acquiring and using new technology. They understand the inherent risks—personal and organizational—of technology applications, and they take actions to prevent or mitigate these risks.

5. Utilize critical thinking to make sense of problems and persevere in solving them.

Career-ready individuals recognize problems in the workplace, understand the nature of the problems, and devise effective plans to solve the problems. They thoughtfully investigate the root cause of a problem prior to introducing solutions. They carefully consider options to solve a problem and, once agreed upon, follow through to ensure the problem is resolved.

6. Practice personal health and understand financial literacy.

Career-ready individuals understand the relationship between personal health and workplace performance. They contribute to their personal well-being through a healthy diet, regular exercise, and mental health activities. Career-ready individuals also understand that financial literacy leads to a secure future that enables career success.

7. Act as a responsible citizen in the workplace and the community.

Career-ready individuals understand the obligations and responsibilities of being a member of a community and demonstrate this understanding every day through their interactions with others. They are aware of the impacts of their decisions on others and the environment around them, and they think about the short-term and long-term consequences of their actions. They are reliable and consistent in going beyond minimum expectations and in participating in activities that serve the greater good.

8. Model integrity, ethical leadership, and effective management.

Career-ready individuals consistently act in ways that align with personal and community-held ideals and principles. They employ ethical behaviors and actions that positively influence others. They have a clear understanding of integrity and act on this understanding in every decision. They use a variety of means to positively impact the direction and actions of a team or organization, and they recognize the short-term and long-term effects that management's actions and attitudes can have on productivity, morale, and organizational culture.

9. Work productively in teams while integrating cultural and global competence.

Career-ready individuals contribute positively to every team, as both team leaders and team members. To avoid barriers to productive and positive interaction, they apply an awareness of cultural differences. They interact effectively and sensitively with all members of the team and find ways to increase the engagement and contribution of other members.

10. Demonstrate creativity and innovation.

Career-ready individuals recommend ideas that solve problems in new and different ways and contribute to the improvement of the organization. They consider unconventional ideas and suggestions by others as solutions to issues, tasks, or problems. They discern which ideas and suggestions may have the greatest value. They seek new methods, practices, and ideas from a variety of sources and apply those ideas to their own workplace practices.

11. Employ valid and reliable research strategies.

Career-ready individuals employ research practices to plan and carry out investigations, create solutions, and keep abreast of the most current findings related to workplace environments and practices. They use a reliable research process to search for new information and confirm the validity of sources when considering the use and adoption of external information or practices.

12. Understand the environmental, societal, and economic impacts of decisions.

Career-ready individuals understand the interrelated nature of their actions and regularly make decisions that positively impact other people, organizations, the workplace, and the environment. They are aware of and utilize new technologies, understandings, procedures, and materials and adhere to regulations affecting the nature of their work. They are cognizant of impacts on the social condition, environment, workplace, and profitability of the organization.

Statement for Civil Rights

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



This copyrighted material is provided by the Los Angeles Unified School District ("District"), Division of Adult and Career Education solely for educational purposes. You may not reproduce, distribute, republish, transfer, upload, download, or post the material except as authorized, without prior written authorization of the District. You may not modify, adapt, or create derivative works therefrom without express written consent of the District.