

Florida Department of Education  
CURRICULUM FRAMEWORK

**Program Title:** Customer Service Representative  
**Occupational Area:** Marketing

|                        |   |  |
|------------------------|---|--|
|                        | <u>Secondary</u>  | <u>PSAV</u>  |
| <b>Program Number:</b> | <b>8848100</b>  | <b>M807060</b>   |
| CIP Number:            | 0208.070600   | 0208.070600  |
| Grade Level:           | 9-12, 30, 31  | 30, 31   |
| Length:                | 4 Credits   | 600 Hours  |
| Certification:         | RETAILING @7 G<br>MKTG <u>1@2</u><br>TEACH CDE @7<br>DIST ED @7<br>ADVR PROM @7 G<br>BANK FINC @7 G<br>HOTEL TRNG @7 G<br>INSURANCE @7 G<br>MKTG MGMT @7 G<br>TRANSPORT @4 @7 G<br>WHOLESALE @7 G | RETAILING @7 G<br>MKTG 1@2<br>TEACH CDE @7<br>DIST ED @7<br>ADVR PROM @7 G<br>BANK FINC @7 G<br>HOTEL TRNG @7 G<br>INSURANCE @7 G<br>MKTG MGMT @7 G<br>TRANSPORT @4 @7 G<br>WHOLESALE @7 G |

|             |      |     |
|-------------|------|-----|
| CTSO:       | DECA | DEX |
| Coop Method | Yes  | Yes |

|              |   |
|--------------|---|
| Basic Skills |   |
| Math         | 9 |
| Language     | 9 |
| Reading      | 9 |

I. **MAJOR CONCEPTS/CONTENT:** The purpose of this program is to prepare students for employment in customer service occupations such as customer service representative, customer service consultant, customer service agent, and customer care manager. The program is designed to prepare students for employment in entry level positions involving customer service activities.

The content includes interpersonal skills, customer service and selling concepts, math, keyboarding, communication skills, and employability skills.

Instruction is structured to meet the requirements for gainful entry level employment in any customer service industry areas such as Fashion Marketing, Finance and Credit, Food, Import/Export Marketing, Insurance, Telecommunications, Hospitality, and virtually all other industry categories.

Listed below are the courses that comprise this program:

- 8848110 Customer Service 1
- 8848120 Customer Service 2
- 8848130 Customer Service 3
- 8848140 Customer Service 4

II. **LABORATORY ACTIVITIES:** Laboratory activities are an integral part of this program and include the use of computers and peripheral equipment.

**III. SPECIAL NOTE:** DECA, "An Association of Marketing Students" (secondary), and Delta Epsilon Chi, "An Association of Marketing Students" (postsecondary), are the appropriate career and technical student organizations for providing leadership learning experiences and for reinforcing specific career and technical skills. Career and Technical Student Organizations, when provided, shall be an integral part of the career and technical instructional program, and the activities of such organizations are defined as part of the curriculum in accordance with Rule 6A-6.065 (8), FAC.

Cooperative training (OJT), 8800410/M899990/0208.9999CP, or Guided Workplace-Learning, 8300430/D886300/1098.8630CP, are highly recommended to use with this program as a work-based learning experience. When OJT is offered, each student is required to have a training agreement and a training plan, signed by the student, parent/guardian, teacher/coordinator, and employer. The training plan shall include a diverse list of instructional objectives and on-the-job and in-school learning experiences. The workstation shall reflect equipment, skills, and tasks relevant to the occupation the student has chosen as a career goal. The student must receive compensation for work performed.

When Guided Workplace-Learning is offered, the student is allowed to work a maximum of 450 hours and must participate, with the work-based learning site supervisor, in a preplacement conference. A work-based learning plan must be developed to include the learning objectives, methods of learning, activities/responsibilities, time required, provisions for supervision, and method(s) of student evaluation. Students must also meet a minimum of once per week for the purpose of related instruction and developmental activities. Employment may be either paid or unpaid. (For additional information consult the Guided Workplace-Learning framework.)

It is highly recommended that for every 20 students (or portion thereof) enrolled in Marketing OJT and/or Guided Workplace Learning, the teacher/coordinator be given a minimum of one hour of OJT-coordination release time per day for the purposes of visiting students on the job and managing the cooperative method of instruction.

The teacher/coordinator should visit each training site for the purpose of observation a minimum of once during each grading period, preferably while the student is actually working. A second contact each grading period for the purpose of evaluating the student's progress in attaining the competencies listed in the work-based learning plan/training plan is highly recommended.

In accordance with Rule 6A-10.040, FAC, the minimum basic-skills grade levels required for adult vocational students to complete this program are: Mathematics 9.0, Language 9.0, Reading 9.0. These grade-level numbers correspond to grade-equivalent scores obtained on one of the state-designated basic-skills examinations. If a student does not meet the basic-skills level required for completion of the program, remediation should be provided concurrently through Vocational Preparatory Instruction (VPI). Please refer to the Rule for exemptions.

SCANS Competencies: Instructional strategies for this program must include methods that require students to identify, organize, and use resources appropriately; to work with each other cooperatively and productively; to acquire and use information; to understand social, organizational, and technological systems; and to work with a variety of tools and equipment. Instructional strategies must also incorporate methods to improve students' personal qualities, higher-order critical thinking skills, and problem solving, technical, and literacy skills.

To be transferable statewide between institutions, this program/course must have been reviewed, and a "transfer value" assigned the curriculum content by the appropriate Statewide Course Numbering System discipline committee. This does not preclude institutions from developing specific program or course articulation agreements with each other.

When offered at the postsecondary adult vocational level, this program may be offered in courses. Vocational credit shall be awarded to the student on a transcript in accordance with Section 230.643 F.S.

When a secondary student with a disability is enrolled in a vocational class with modifications to the curriculum framework, the particular outcomes and student performance standards, which the student must master to earn credit, must be specified on an individual basis. The job or jobs for which the student is being trained should be reflected in the student's desired postschool outcome statement on the Transition Individual Education Plan (Transition IEP).

- IV. **INTENDED OUTCOMES:** After successfully completing appropriate course(s) for each Occupational Completion Point of this program, the student will be able to perform the following:

**OCCUPATIONAL COMPLETION POINT - DATA CODE - A**

CALL CENTER REPRESENTATIVE 1- Industry Title

- 01.0 Demonstrate knowledge of identification and classification of customer services.
- 02.0 Demonstrate technology literacy appropriate to customer service.
- 03.0 Describe and demonstrate human relations skills necessary for success in customer service.
- 04.0 Demonstrate communication skills necessary for success in customer service.
- 05.0 Identify terminology unique to customer service operations.
- 06.0 Describe call center representative duties and responsibilities.
- 07.0 Explain and perform telephone activities unique to customer service.
- 08.0 Identify customer service activities.
- 09.0 Demonstrate job seeking and employability skills.
- 10.0 Develop a plan for a career in customer service.

**OCCUPATIONAL COMPLETION POINT - DATA CODE - B**

CALL CENTER REPRESENTATIVE 2- Industry Title

- 02.0 Demonstrate technology literacy appropriate to customer service.
- 04.0 Demonstrate communication skills necessary for success in customer service.
- 06.0 Describe call center representative duties and responsibilities.
- 07.0 Explain and perform telephone activities unique to customer service.
- 08.0 Identify customer service activities.
- 09.0 Demonstrate job seeking and employability skills.
- 10.0 Develop a plan for a career in customer service.
- 11.0 Describe leadership and organizational skills necessary for success in customer service.
- 12.0 Utilize effective techniques and procedures for selling customer services.
- 13.0 Demonstrate basic math operations relevant to customer services.
- 14.0 Demonstrate an understanding of a client's business, policies, and procedures.

**OCCUPATIONAL COMPLETION POINT - DATA CODE - C**

CUSTOMER CARE REPRESENTATIVE - Industry Title

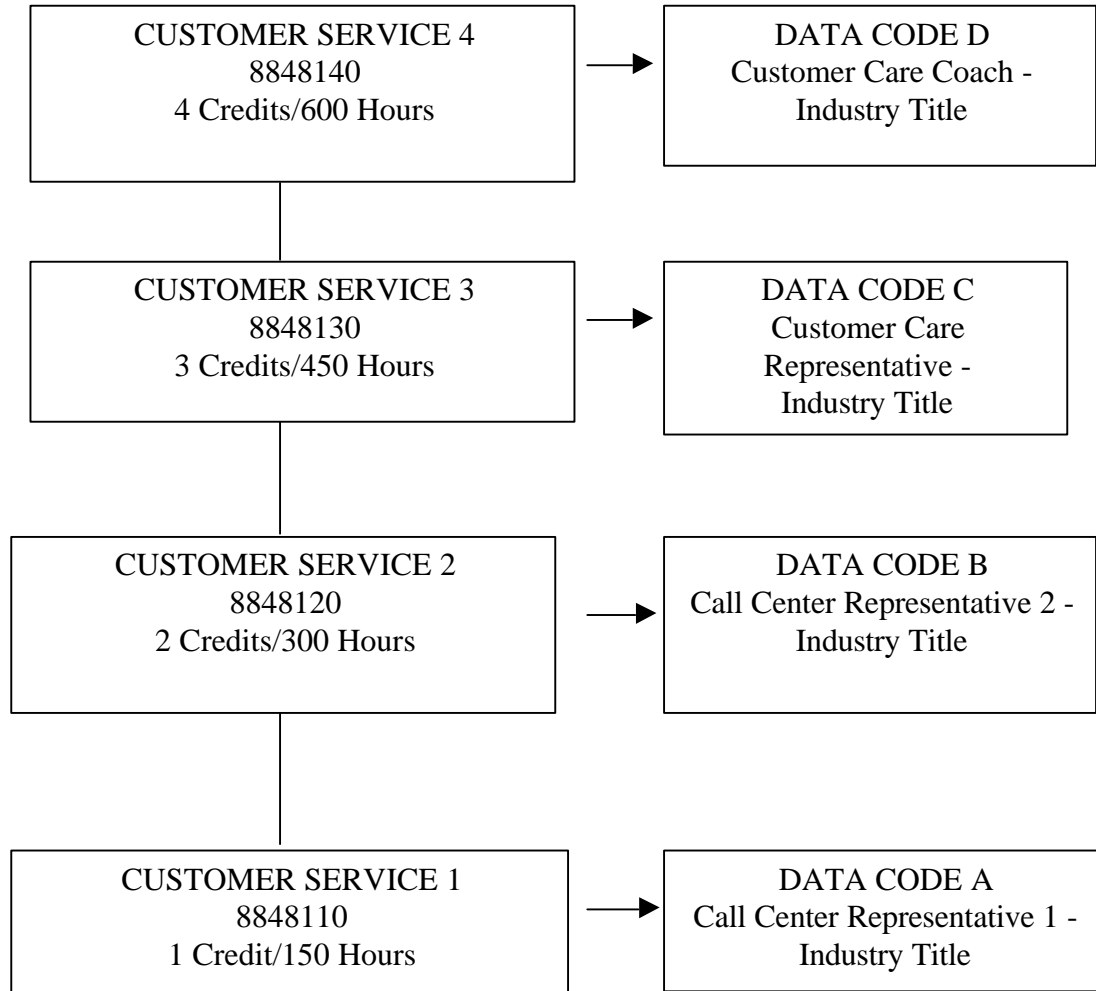
- 13.0 Demonstrate basic math operations relevant to customer services.
- 15.0 Demonstrate higher order human relations skills necessary for success in customer service occupations.
- 16.0 Demonstrate higher order ability to communicate skillfully.
- 17.0 Demonstrate an awareness of management functions and organizational structures.
- 18.0 Demonstrate an understanding of basic contractual obligations.
- 19.0 Perform higher order keyboarding activities and use of office equipment appropriate to customer service.

**OCCUPATIONAL COMPLETION POINT - DATA CODE - D**

CUSTOMER CARE COACH - Industry Title

- 20.0 Analyze impact and relationship of government regulations and community involvement of management decisions.
- 21.0 Demonstrate an advanced ability to communicate skillfully.
- 22.0 Utilize higher order effective techniques and procedures for selling customer services.
- 23.0 Demonstrate higher order math operations relevant to customer services.
- 24.0 Perform higher order keyboarding activities and use of office equipment appropriate to customer service.
- 25.0 Demonstrate performance of supervisory/management functions.
- 26.0 Demonstrate an understanding of business ownership.

**CUSTOMER SERVICE REPRESENTATIVE**  
**8848100/M807060/0208.070600**



Florida Department of Education  
STUDENT PERFORMANCE STANDARDS

**Program Title:** Customer Service Representative  
**Postsecondary Number:** M807060

**OCCUPATIONAL COMPLETION POINT - DATA CODE - A**

CALL CENTER REPRESENTATIVE 1 - Industry Title

01.0 DEMONSTRATE KNOWLEDGE OF IDENTIFICATION AND CLASSIFICATION OF CUSTOMER SERVICES--The student will be able to:

- 01.01 Define customer, customer service, and quality.
- 01.02 Explain the nature of quality customer/client relations.
- 01.03 Demonstrate ability to handle customer inquiries/complaints.
- 01.04 Demonstrate ability to handle difficult customers.
- 01.05 Interpret company policies to customer/clients.
- 01.06 Classify customer services according to nature and characteristics of the activity.
- 01.07 Demonstrate competence in resolving customer problems through clarifying, explaining policy/procedure, and coming to a consensus.
- 01.08 Explain the importance of stress management as it relates to job performance.

02.0 DEMONSTRATE TECHNOLOGY LITERACY APPROPRIATE TO CUSTOMER SERVICE--The student will be able to:

- 02.01 Identify types of technology, systems, and software used in customer service.
- 02.02 Describe applications of technology in customer service (e.g., file management, e-mail management).
- 02.03 Discuss ethical issues involving the use of technology, employer/employee relationships, and customers.
- 02.04 Demonstrate proficiency with touch keyboarding skills to enter and manipulate text and data.
- 02.05 Demonstrate computer literacy by producing documents generated by word processing software.
- 02.06 Explain relationship between database management and call centers.
- 02.07 Employ current and emerging computer technology and software to perform customer service related tasks.
- 02.08 Demonstrate use of electronic communication and networking systems (e.g., fax, e-mail, voice mail, Internet).
- 02.09 Research current and emerging telecommunications systems.
- 02.10 Analyze situations in which technology can positively and negatively impact customer service.

03.0 DESCRIBE AND DEMONSTRATE HUMAN RELATIONS SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:

- 03.01 Model punctuality, initiative, courtesy, loyalty, honesty, respect, responsibility, fairness, and trustworthiness.
- 03.02 List acceptable health and grooming habits.
- 03.03 Explain importance of adhering to absentee and tardy policy.
- 03.04 Exhibit the ability to work as a team player.

- 03.05 Discuss and develop the human relations skills essential for successful entry and progress in the customer service field.
  - 03.06 Model empathy, compassion, caring, enthusiasm, integrity, positive attitude, self motivation, and responsible behavior.
  - 03.07 Demonstrate orderly and systematic behavior (follow chain of command).
  - 03.08 Explain the importance of working effectively with persons from diverse backgrounds.
  - 03.09 Demonstrate ability to maintain professional respect for co-workers and customers without prejudice.
  - 03.10 Demonstrate conflict and dispute resolution techniques for effective teamwork.
  - 03.11 Demonstrate techniques to persuade and convince others.
  - 03.12 Explain importance of self-management when minimum direction and supervision are given.
  - 03.13 Describe ethical situations in the customer service field.
  - 03.14 Describe importance and benefits of time management, both professional and personal.
  - 03.15 Prepare a time management analysis.
  - 03.16 Use a personality inventory for personal improvement.
  - 03.17 Employ feedback for personal and professional growth.
  - 03.18 Demonstrate ability to adjust to change.
  - 03.19 Exhibit corporate and professional etiquette.
- 04.0 DEMONSTRATE COMMUNICATION SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:
- 04.01 Role-play greeting and assisting visitors and clients in a professional manner.
  - 04.02 Demonstrate appropriate use of grammar, vocabulary, diction, and body language for delivering professional customer service.
  - 04.03 Identify appropriate conversation for work-related settings.
  - 04.04 Model professional vocabulary appropriate for the work environment.
  - 04.05 Demonstrate ability to communicate in a multi-cultural setting.
  - 04.06 Demonstrate ability to interact with customers, co-workers, and supervisors in a logical, clear, understandable, and effective manner.
  - 04.07 Describe and demonstrate listening, speaking, and non-verbal skills necessary to determine customer needs.
  - 04.08 Identify major barriers to listening and demonstrate techniques to overcome those barriers.
  - 04.09 Explain the importance of using a pleasant tone of voice, smiling, making eye contact, maintaining proper posture, listening, being prepared to answer questions, using customer's name, handling customer complaints, and thanking the customer.
  - 04.10 Demonstrate ability to focus on problem, not person, so as to avoid becoming defensive.
  - 04.11 Monitor written, oral, and electronic sources of information and materials relevant to delivering accurate customer service.
- 05.0 IDENTIFY TERMINOLOGY UNIQUE TO CUSTOMER SERVICE OPERATIONS--The student will be able to:

- 05.01 Identify and define commonly used customer service terms such as credit, adjustments, complaints, delivery service, and internal and external customers.
  - 05.02 Identify and record customer service data using current terminology.
- 06.0 DESCRIBE CALL CENTER REPRESENTATIVE DUTIES AND RESPONSIBILITIES--  
The student will be able to:
- 06.01 Identify different types of call centers.
  - 06.02 Discuss the role of the customer service specialist.
  - 06.03 Identify benefits of customer service.
  - 06.04 Identify reasons for providing customer service.
  - 06.05 Describe the customer-service mindset.
  - 06.06 Identify factors to be considered when deciding which customer services to provide.
  - 06.07 Compare various types of customer service (e.g., mass market, department store, specialty).
  - 06.08 Explain the importance of good customer service relations to a business.
  - 06.09 Describe importance of possessing adequate knowledge of services and products to perform the customer service job competently.
  - 06.10 Demonstrate methods of communicating with customers to identify their needs and expectations.
  - 06.11 Discuss importance of accuracy, efficiency, and follow through when dealing with customers.
  - 06.12 Demonstrate methods of communicating with customers to identify their problems and expectations.
  - 06.13 Identify major areas of customer complaints (e.g., product, personnel, business).
  - 06.14 List the costs, tangible and intangible, of complaints to both the salesperson and business.
  - 06.15 Explain how to handle customer inquiries/complaints including appropriate documentation.
  - 06.16 Identify types of resources to be used in resolving the problems and satisfying the needs of customers.
  - 06.17 Identify types of difficult customers (e.g., disagreeable, domineering/superior, suspicious, slow/methodical, dishonest).
  - 06.18 Explain procedures for handling difficult internal and external customers.
  - 06.19 Identify possible actions that lead to customer satisfaction.
  - 06.20 Identify the ways that the level of customer service may affect company success.
  - 06.21 Identify the ways that the reputation of a business is influenced by customer satisfaction.
  - 06.22 Recognize the importance of stress management as it relates to job performance.
  - 06.23 Demonstrate an understanding of gender, age, disability, and cultural courtesy.
- 07.0 EXPLAIN AND PERFORM TELEPHONE ACTIVITIES UNIQUE TO CUSTOMER SERVICE--The student will be able to:
- 07.01 Demonstrate techniques for making a positive first impression or continue a positive relationship using the telephone (e.g., vocabulary, voice quality and tone, grammar, courteousness, rapport).



- 07.02 Identify and demonstrate techniques of placing, answering, screening, placing on hold, and directing telephone calls.
  - 07.03 Identify and demonstrate procedures for recording and relaying accurate messages.
  - 07.04 Explain procedures for dealing with an obscene telephone call.
  - 07.05 Identify components of a customer service call.
  - 07.06 Demonstrate use of the telephone as a customer service tool to gather, receive, record, and convey accurate and complete information in a professional and courteous manner.
  - 07.07 Demonstrate active listening skills.
  - 07.08 Demonstrate ability to organize ideas and communicate oral messages appropriate to listener and situation.
  - 07.09 Review guidelines to inform customers of order receipt, prices, shipping date, and delays.
  - 07.10 Describe a positive and caring telephone voice.
  - 07.11 Demonstrate techniques for dealing with an irate or upset caller, remembering that "the customer is always right."
  - 07.12 Model the impact of facial expression on tone of voice.
  - 07.13 Explain importance of maintaining a telephone log.
  - 07.14 Demonstrate ability to maintain a telephone log accurately and in accordance with organization procedures.
  - 07.15 Demonstrate ability to access voice mail and record information accurately and neatly and note if response is required.
  - 07.16 Demonstrate ability to retrieve messages from an answering machine and record information accurately and neatly and note if response is required.
  - 07.17 Practice logging in and out of telephone systems.
- 08.0 IDENTIFY CUSTOMER SERVICE ACTIVITIES--The student will be able to:
- 08.01 Role-play appropriate customer greetings.
  - 08.02 Describe how an employee represents the firm to customers.
  - 08.03 Explain techniques to balance responsive telephone service with in-store service.
  - 08.04 Demonstrate ability to determine the individual customer's need for specific types of product support and customer services.
  - 08.05 Discuss the importance of suggestive selling of complimentary goods/services.
  - 08.06 Demonstrate knowledge of current and potential customer services offered by selected marketing organizations.
  - 08.07 Demonstrate ability to overcome objections.
  - 08.08 Explain role of customer mailing lists in the customer service industry.
  - 08.09 Role-play thanking the customer using appropriate English.
  - 08.10 Explain methods of observation that can be used to obtain customer's surname.
  - 08.11 Discuss importance of customer follow-up including those instances when writing a thank you note could be appropriate.
  - 08.12 Describe techniques for identifying and satisfying customer needs/wants/problems.
  - 08.13 Explain techniques for determining customer merchandise/service interests.
  - 08.14 Discuss techniques for recognizing and responding to customer preference(s).
  - 08.15 Explain importance of listening to customer needs/wants/problems.

- 08.16 Explain importance of product knowledge, features, and benefits to successful cross selling.
  - 08.17 Demonstrate ability to obtain customer commitment.
  - 08.18 Model methods of resolving customer complaints.
  - 08.19 Discuss importance of assisting customer in location of desired item(s).
  - 08.20 List abilities and qualities customers expect.
- 09.0 DEMONSTRATE JOB SEEKING AND EMPLOYABILITY SKILLS--The student will be able to:
- 09.01 Identify resources used in a customer service job search.
  - 09.02 Identify steps of the job application process including researching the company prior to an interview and obtaining proper documentation (e.g., green card).
  - 09.03 Locate company site on the Internet.
  - 09.04 Identify documentation needed prior to seeking employment.
  - 09.05 Discuss importance of drug tests and criminal background checks in identifying possible customer service employment opportunities.
  - 09.06 Demonstrate appropriate dress and grooming for employment.
  - 09.07 List documents an employer is required to have completed by an employee for payroll and eligibility purposes.
  - 09.08 Arrange for personal references.
  - 09.09 Prepare a neat, legible resume (traditional and electronic).
  - 09.10 Prepare a job application letter for a customer service position.
  - 09.11 Read and accurately complete job application forms for customer service positions.
  - 09.12 Participate in a behavioral job interview by role playing as an interviewer and an applicant.
  - 09.13 Demonstrate methods for handling illegal interview and application form questions.
  - 09.14 Compose a set of questions to ask of an interviewer.
  - 09.15 Participate in pre-employment testing (e.g., simulations, telephone interview, telephone screening).
  - 09.16 Conduct an interview follow-up.
  - 09.17 List procedures to follow when accepting an employment offer.
  - 09.18 Illustrate an understanding of the appropriate techniques to use when changing jobs.
  - 09.19 Describe appropriate methods for resigning from a position.
  - 09.20 Identify reasons for termination.
  - 09.21 Prepare a letter of resignation.
  - 09.22 Identify and demonstrate appropriate responses to feedback from supervisors.
  - 09.23 Identify and demonstrate acceptable work habits.
  - 09.24 Demonstrate acceptable health and hygiene habits.
  - 09.25 Discuss examples of company standards, policies, and procedures.
  - 09.26 Explain importance of following accepted rules, regulations, policies, and workplace safety guidelines.
  - 09.27 Describe importance of producing quality work and meeting performance standards.
  - 09.28 Describe implications of racial, ethnic, regional, educational, social, and age differences.
  - 09.29 Demonstrate attitudes and behaviors that eliminate stereotyping, gender bias, and recognize the value of cultural diversity.
  - 09.30 Demonstrate ability to work as a team member.

- 09.31 Demonstrate a strong work ethic and a positive attitude both personally and professionally.
  - 09.32 Recognize the importance of the efficient use of materials and space on the job.
  - 09.33 Demonstrate an understanding of ethical business practices.
  - 09.34 Explain the importance of confidentiality in the workplace concerning any written, oral, or technically transmitted information pertaining to personnel, customers, or materials.
  - 09.35 Obtain letters of reference summarizing work/volunteer experiences.
- 10.0 DEVELOP A PLAN FOR A CAREER IN CUSTOMER SERVICE--The student will be able to:
- 10.01 Discuss the advantages and disadvantages of working in the customer service field.
  - 10.02 Identify personal qualities necessary to be successful as a customer service representative.
  - 10.03 Research a customer service occupation.
  - 10.04 Diagram a career path for the customer service associate.
  - 10.05 Write a job description for a customer service associate.
  - 10.06 Identify the educational requirements and work experience needed for a customer service associate.
  - 10.07 Identify personal qualities and skills necessary for job enhancement and career development in the customer service field.
  - 10.08 Develop forms of documentation for inclusion in a career portfolio.

**OCCUPATIONAL COMPLETION POINT - DATA CODE - B**  
 CALL CENTER REPRESENTATIVE 2- Industry Title

- 02.0 DEMONSTRATE TECHNOLOGY LITERACY APPROPRIATE TO CUSTOMER SERVICE--The student will be able to:
- 02.11 Demonstrate computer literacy by producing documents generated by database and spreadsheet software.
  - 02.12 Employ reference materials such as on-line help, vendor bulletin boards, tutorials, and manuals available for application software.
  - 02.13 Employ computer networks (e.g., Internet, on-line databases, e-mail) to facilitate collaborative or individual learning and communication.
- 04.0 DEMONSTRATE COMMUNICATION SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:
- 04.12 Demonstrate techniques for writing letters and memorandums appropriate to the particular audience (e.g., management, customers, co-workers, manufacturers).
  - 04.13 Monitor written, oral, and electronic sources of information and materials relevant to delivering accurate customer service.
  - 04.14 Compose e-mail and business letters.
  - 04.15 Demonstrate effective probing skills.
- 06.0 DESCRIBE CALL CENTER REPRESENTATIVE DUTIES AND RESPONSIBILITIES --The student will be able to:

- 06.24 Identify potentially difficult customers and strategies to meet their needs.
  - 06.25 Explain differences between consumer rights and business responsibilities.
  - 06.26 Explain differences between internal and external customers (e.g., productivity, motivation, commitment, and stress management vs. order taking, handling routine inquiries and application questions, and problem solving).
  - 06.27 Exhibit how to interpret policies to internal and external customers.
  - 06.28 Exhibit sensitivity to internal and external customer needs.
  - 06.29 Classify customer services according to nature and characteristics of the activity.
  - 06.30 Classify customer services considered primary or essential and those considered secondary or optional.
  - 06.31 Review methods to resolve customer problems through clarifying, explaining policy/procedure, and coming to a consensus.
  - 06.32 Analyze the relationship between public relations and marketing.
  - 06.33 Demonstrate methods to initiate and maintain client account records.
  - 06.34 Prepare statements for clients.
- 07.0 EXPLAIN AND PERFORM TELEPHONE ACTIVITIES UNIQUE TO CUSTOMER SERVICE--The student will be able to:
- 07.18 Assume accountability for the technical and customer services provided during service calls.
  - 07.19 Demonstrate ability to maintain a file of addresses and telephone numbers.
- 08.0 IDENTIFY CUSTOMER SERVICE ACTIVITIES--The student will be able to:
- 08.19 Discuss importance of changing displays to maintain customer interest.
  - 08.20 Explain the concepts of market segmentation and niche marketing.
- 09.0 DEMONSTRATE JOB SEEKING AND EMPLOYABILITY SKILLS--The student will be able to:
- 09.36 Create and maintain an employability portfolio demonstrating awareness of personal abilities, interests, and skills as they relate to seeking employment.
  - 09.37 Identify qualities typically required for promotion and job advancement (e.g., productivity, dependability, initiative, responsibility).
  - 09.38 Practice providing direction and assistance to other team members by acting as a role model, coach, and motivator.
  - 09.39 Illustrate working independently with little supervision.
  - 09.40 Identify how to prepare for job separation and reemployment.
  - 09.41 Relate the importance of quality control in job performance (TQM).
  - 09.42 Participate in a job shadowing experience.
  - 09.43 Demonstrate knowledge of how to make job changes appropriately.

- 10.0 DEVELOP A PLAN FOR A CAREER IN CUSTOMER SERVICE--The student will be able to:
- 10.09 Prepare and implement an individual career and education plan for continuous career development.
- 11.0 DESCRIBE LEADERSHIP AND ORGANIZATIONAL SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:
- 11.01 Describe qualities of an effective leader.
  - 11.02 Describe different types of leadership.
  - 11.03 Identify and utilize the planning process.
  - 11.04 Outline steps utilized in problem resolution when dealing with customers.
  - 11.05 Outline and apply steps used in decision-making when dealing with customers.
  - 11.06 Work cooperatively within a group to achieve organizational goals.
  - 11.07 Describe the role of the vision and mission statement in a customer service organization.
  - 11.08 Explain how innovation and efficiency impact the customer service organization.
  - 11.09 Display the ability to adjust behavior as appropriate to the situation, listening and responding with appropriate manners.
  - 11.10 Model personal responsibility for the welfare of others.
  - 11.11 Model appropriate technique for shaking hands as a professional.
- 12.0 UTILIZE EFFECTIVE TECHNIQUES AND PROCEDURES FOR SELLING CUSTOMER SERVICES--The student will be able to:
- 12.01 Demonstrate how to increase total sales volume by selling complementary services to the main product(s).
  - 12.02 Demonstrate knowledge of current and potential customer services offered by selected marketing organizations.
  - 12.03 Demonstrate the ability to determine the individual customer's need for specific types of product support customer services.
  - 12.04 Explain the "value added" concept as it applies to customer services.
  - 12.05 Evaluate ability to overcome objections.
  - 12.06 Demonstrate ability to identify and satisfy customer needs/wants/problems.
  - 12.07 Evaluate ability to obtain customer commitment.
  - 12.08 Identify and demonstrate cross-selling techniques.
  - 12.09 Explain concept of "product" as an ingredient in the marketing mix.
  - 12.10 Explain the relationship of economic utilities and customer services.
- 13.0 DEMONSTRATE BASIC MATH OPERATIONS RELEVANT TO CUSTOMER SERVICE--The student will be able to:
- 13.01 Perform basic computational operations.
  - 13.02 Solve work-related problems using whole numbers, fractions, decimals, ratios, and percentages.
  - 13.03 Operate a 10-key keypad.

14.0 DEMONSTRATE AN UNDERSTANDING OF A CLIENT'S BUSINESS, POLICIES, AND PROCEDURES--The student will be able to:

- 14.01 Identify client's mission and objectives.
- 14.02 Identify the type of business in which the client is engaged.
- 14.03 Identify customer service guidelines.
- 14.04 Identify procedure for logging in and out of client's system.
- 14.05 Identify correct screen management techniques.
- 14.06 Identify codes for different procedures.
- 14.07 Identify data entry guidelines including procedure for error editing and correction.
- 14.08 Identify procedure to obtain assistance (i.e., help desk, on-line help).
- 14.09 Demonstrate ability to receive and process calls per client's guidelines.
- 14.10 Practice taking orders, requests, etc., as required by client.

**OCCUPATIONAL COMPLETION POINT - DATA CODE - C**  
CUSTOMER CARE REPRESENTATIVE- Industry Title

13.0 DEMONSTRATE BASIC MATH OPERATIONS RELEVANT TO CUSTOMER SERVICES--The student will be able to:

- 13.04 Demonstrate correct procedures for handling major types of sales transactions.
- 13.05 Reconcile a customer account.

15.0 DEMONSTRATE HIGHER ORDER HUMAN RELATIONS SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE OCCUPATIONS--The student will be able to:

- 15.01 Identify benefits of professional staff development (e.g., workshops, conferences, course work, and membership in professional associations).
- 15.02 Explain the need for employee evaluations, describe the procedures used in the evaluation process, and identify the consequences of positive or negative performance appraisals.
- 15.03 Describe methods used to compensate employees (e.g., wages, salary, commission).
- 15.04 Practice accurately answering call center representative questions on policies, procedures, and systems.
- 15.05 Practice guiding call center representatives through reference materials.
- 15.06 Practice monitoring and providing coaching and feedback to call center representatives.
- 15.07 Identify a variety of action plans to educate new hires.

16.0 DEMONSTRATE HIGHER ORDER ABILITY TO COMMUNICATE SKILLFULLY--The student will be able to:

- 16.01 Give oral reports to demonstrate the ability to express oneself in a concise, timely, and professional manner.
- 16.02 Demonstrate effective probing skills.
- 16.03 Demonstrate effective communication of impact of a business decision.

- 17.0 DEMONSTRATE AN AWARENESS OF MANAGEMENT FUNCTIONS AND ORGANIZATIONAL STRUCTURES--The student will be able to:
- 17.01 Identify the different levels of management.
  - 17.02 Identify, compare, and contrast the various forms of business ownership (e.g., sole proprietorship, partnership, corporation, franchise) and other organizational structures (nonprofit organizations, government agencies).
  - 17.03 Compare and contrast the legal procedures and processes involved when establishing business ownership (e.g., sole proprietorship, partnership, limited partnership, joint ventures, limited partnership associations, registered partnerships with limited liability, limited liability corporation, corporation, franchise).
  - 17.04 Compare and contrast the advantages and disadvantages of each type of business ownership based upon complexity and risk of legal procedures and processes.
  - 17.05 Demonstrate knowledge of procedures, systems, and reference materials.
- 18.0 DEMONSTRATE AN UNDERSTANDING OF BASIC CONTRACTUAL OBLIGATIONS--The student will be able to:
- 18.01 Demonstrate an understanding of contractual relationships.
  - 18.02 Explain how an offer and acceptance can create contractual rights and duties.
  - 18.03 Identify people who lack contractual capacity.
  - 18.04 Describe breach of contract and the remedies available when a contract is breached.
  - 18.05 Define an agency relationship and list the ways that agency relationships may be created.
  - 18.06 Identify which applicants may be asked to participate in testing (e.g., aptitude, psychological, polygraph, drug).
- 19.0 PERFORM HIGHER ORDER KEYBOARDING ACTIVITIES AND USE OF OFFICE EQUIPMENT APPROPRIATE TO CUSTOMER SERVICE--The student will be able to:
- 19.01 Key and apply formatting principles.
  - 19.02 Obtain and transmit credit information.
  - 19.03 Perform basic computer operations.

**OCCUPATIONAL COMPLETION POINT - DATA CODE - D**

CUSTOMER CARE COACH - Industry Title

- 20.0 ANALYZE IMPACT AND RELATIONSHIP OF GOVERNMENT REGULATIONS AND COMMUNITY INVOLVEMENT ON MANAGEMENT DECISIONS--The student will be able to:
- 20.01 Understand anti-trust laws and how they affect corporate behavior.
  - 20.02 Describe the pros and cons of various levels of community involvement by a business.
  - 20.03 Describe how tax policies affect a business.
  - 20.04 Describe how licensure requirements affect a business.
  - 20.05 Describe how government regulations affect a business.
  - 20.06 Identify and evaluate various ways in which government affects business.

- 21.0 DEMONSTRATE AN ADVANCED ABILITY TO COMMUNICATE SKILLFULLY--The student will be able to:
- 21.01 Prepare a variety of categories/structures of messages.
  - 21.02 Practice providing written/verbal feedback that is clear, concise, and professional.
- 22.0 UTILIZE HIGHER ORDER EFFECTIVE TECHNIQUES AND PROCEDURES FOR SELLING CUSTOMER SERVICES--The student will be able to:
- 22.01 Develop a written feature-benefit analysis sheet for a specified customer service.
  - 22.02 Effectively critique a sales demonstration involving customer services.
  - 22.03 Demonstrate effective suggestion selling techniques to solve client problems.
  - 22.04 Develop an action plan to improve call center representative sales performance.
- 23.0 DEMONSTRATE HIGHER ORDER MATH OPERATIONS RELEVANT TO CUSTOMER SERVICES--The student will be able to:
- 23.01 Complete an invoice and purchase order return.
  - 23.02 Calculate discount dates, due dates, and amount of payment.
  - 23.03 Read charts and graphs.
  - 23.04 Post debits and credits.
  - 23.05 Calculate basis points.
- 24.0 PERFORM HIGHER ORDER KEYBOARDING ACTIVITIES AND USE OF OFFICE EQUIPMENT APPROPRIATE TO CUSTOMER SERVICE--The students will be able to:
- 24.01 Obtain information, schedule, place orders, and route using e-mail, telephone, fax, Internet, and other communication and calculating devices.
- 25.0 DEMONSTRATE PERFORMANCE OF SUPERVISORY/MANAGEMENT FUNCTIONS--The student will be able to:
- 25.01 Describe the functions of management (e.g., planning, organizing, staffing, directing, controlling) and discuss how functions are interrelated.
  - 25.02 Identify factors of strategic planning and define the role of strategic planning in a business environment.
  - 25.03 Demonstrate project management skills.
  - 25.04 Prepare training materials or update existing material.
  - 25.05 Dramatize handling elevated customer calls.
  - 25.06 Demonstrate ways to support team members to achieve personal and team goals.
  - 25.07 Identify relevant management information based on business' existing records.
  - 25.08 Identify appropriate information at various management decision making levels.
  - 25.09 Identify appropriate applications for computer usage.
  - 25.10 Identify administrative tasks that would be the responsibility of the customer care coach.
- 26.0 OPERATE COMPUTERS AND OTHER EQUIPMENT APPROPRIATE TO MARKETING AND MANAGING CUSTOMER SERVICES--The student will be able to:



- 26.01 Obtain and transmit credit information.
  - 26.02 Obtain information, schedule, place orders, and route using telephone, fax, C.P.U., cash register, and other communications and calculating devices.
  - 26.03 Demonstrate merchandising and operations data entry procedures such as prices, sales, inventory changes, costs, and reductions.
- 27.0 DEMONSTRATE AN UNDERSTANDING OF BUSINESS OWNERSHIP--The student will be able to:
- 27.01 Define entrepreneurship.
  - 27.02 List advantages and disadvantages of business ownership.
  - 27.03 Identify risks involved in ownership of a business.
  - 27.04 Identify the personal characteristics necessary to be a successful entrepreneur.
  - 27.05 Identify the business skills needed to operate a business efficiently and effectively.
  - 27.06 Define the purpose and identify and describe the major components of a business plan.
  - 27.07 Identify pros and cons of a home-based business.

July 2001

Florida Department of Education  
STUDENT PERFORMANCE STANDARDS

Course Number: 8848110  
Course Title: Customer Service 1  
Course Credit: 1

**COURSE DESCRIPTION:**

This course provides instruction in the basic principles of customer service including knowledge of identification and classification of customer service, technology literacy related to customer service, the human relations, leadership, organization, and communication skills necessary for success in the customer service industry, and the terminology unique to customer service. At the completion of this course, the student will have met Occupational Completion Data Code A: Call Center Representative 1 - Industry Title.

01.0 DEMONSTRATE KNOWLEDGE OF IDENTIFICATION AND CLASSIFICATION OF CUSTOMER SERVICES--The student will be able to:

- 01.01 Define customer, customer service, and quality.
- 01.02 Explain the nature of quality customer/client relations.
- 01.03 Demonstrate ability to handle customer inquiries/complaints.
- 01.04 Demonstrate ability to handle difficult customers.
- 01.05 Interpret company policies to customer/clients.
- 01.06 Classify customer services according to nature and characteristics of the activity.
- 01.07 Demonstrate competence in resolving customer problems through clarifying, explaining policy/procedure, and coming to a consensus.
- 01.08 Explain the importance of stress management as it relates to job performance.

02.0 DEMONSTRATE TECHNOLOGY LITERACY APPROPRIATE TO CUSTOMER SERVICE--The student will be able to:

- 02.01 Identify types of technology, systems, and software used in customer service.
- 02.02 Describe applications of technology in customer service (e.g., file management, e-mail management).
- 02.03 Discuss ethical issues involving the use of technology, employer/employee relationships, and customers.
- 02.04 Demonstrate proficiency with touch keyboarding skills to enter and manipulate text and data.
- 02.05 Demonstrate computer literacy by producing documents generated by word processing software.
- 02.06 Explain relationship between database management and call centers.
- 02.07 Employ current and emerging computer technology and software to perform customer service related tasks.
- 02.08 Demonstrate use of electronic communication and networking systems (e.g., fax, e-mail, voice mail, Internet).
- 02.09 Research current and emerging telecommunications systems.
- 02.10 Analyze situations in which technology can positively and negatively impact customer service.

- 03.0 DESCRIBE AND DEMONSTRATE HUMAN RELATIONS SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:
- 03.01 Model punctuality, initiative, courtesy, loyalty, honesty, respect, responsibility, fairness, and trustworthiness.
  - 03.02 List acceptable health and grooming habits.
  - 03.03 Explain importance of adhering to absentee and tardy policy.
  - 03.04 Exhibit the ability to work as a team player.
  - 03.05 Discuss and develop the human relations skills essential for successful entry and progress in the customer service field.
  - 03.06 Model empathy, compassion, caring, enthusiasm, integrity, positive attitude, self motivation, and responsible behavior.
  - 03.07 Demonstrate orderly and systematic behavior (follow chain of command).
  - 03.08 Explain the importance of working effectively with persons from diverse backgrounds.
  - 03.09 Demonstrate ability to maintain professional respect for co-workers and customers without prejudice.
  - 03.10 Demonstrate conflict and dispute resolution techniques for effective teamwork.
  - 03.11 Demonstrate techniques to persuade and convince others.
  - 03.12 Explain importance of self-management when minimum direction and supervision are given.
  - 03.13 Describe ethical situations in the customer service field.
  - 03.14 Describe importance and benefits of time management, both professional and personal.
  - 03.15 Prepare a time management analysis.
  - 03.16 Use a personality inventory for personal improvement.
  - 03.17 Employ feedback for personal and professional growth.
  - 03.18 Demonstrate ability to adjust to change.
  - 03.19 Exhibit corporate and professional etiquette.
- 04.0 DEMONSTRATE COMMUNICATION SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:
- 04.01 Role-play greeting and assisting visitors and clients in a professional manner.
  - 04.02 Demonstrate appropriate use of grammar, vocabulary, diction, and body language for delivering professional customer service.
  - 04.03 Identify appropriate conversation for work-related settings.
  - 04.04 Model professional vocabulary appropriate for the work environment.
  - 04.05 Demonstrate ability to communicate in a multi-cultural setting.
  - 04.06 Demonstrate ability to interact with customers, co-workers, and supervisors in a logical, clear, understandable, and effective manner.
  - 04.07 Describe and demonstrate listening, speaking, and non-verbal skills necessary to determine customer needs.
  - 04.08 Identify major barriers to listening and demonstrate techniques to overcome those barriers.
  - 04.09 Explain the importance of using a pleasant tone of voice, smiling, making eye contact, maintaining proper posture, listening, being prepared to answer questions, using customer's name, handling customer complaints, and thanking the customer.
  - 04.10 Demonstrate ability to focus on problem, not person, so as

to avoid becoming defensive.

04.11 Monitor written, oral, and electronic sources of information and materials relevant to delivering accurate customer service.

05.0 IDENTIFY TERMINOLOGY UNIQUE TO CUSTOMER SERVICE OPERATIONS--The student will be able to:

05.01 Identify and define commonly used customer service terms such as credit, adjustments, complaints, delivery service, and internal and external customers.

05.02 Identify and record customer service data using current terminology.

06.0 DESCRIBE CALL CENTER REPRESENTATIVE DUTIES AND RESPONSIBILITIES--The student will be able to:

06.01 Identify different types of call centers.

06.02 Discuss the role of the customer service specialist.

06.03 Identify benefits of customer service.

06.04 Identify reasons for providing customer service.

06.05 Describe the customer-service mindset.

06.06 Identify factors to be considered when deciding which customer services to provide.

06.07 Compare various types of customer service (e.g., mass market, department store, specialty).

06.08 Explain the importance of good customer service relations to a business.

06.09 Describe importance of possessing adequate knowledge of services and products to perform the customer service job competently.

06.10 Demonstrate methods of communicating with customers to identify their needs and expectations.

06.11 Discuss importance of accuracy, efficiency, and follow through when dealing with customers.

06.12 Demonstrate methods of communicating with customers to identify their problems and expectations.

06.13 Identify major areas of customer complaints (e.g., product, personnel, business).

06.14 List the costs, tangible and intangible, of complaints to both the salesperson and business.

06.15 Explain how to handle customer inquiries/complaints including appropriate documentation.

06.16 Identify types of resources to be used in resolving the problems and satisfying the needs of customers.

06.17 Identify types of difficult customers (e.g., disagreeable, domineering/superior, suspicious, slow/methodical, dishonest).

06.18 Explain procedures for handling difficult internal and external customers.

06.19 Identify possible actions that lead to customer satisfaction.

06.20 Identify the ways that the level of customer service may affect company success.

06.21 Identify the ways that the reputation of a business is influenced by customer satisfaction.

06.22 Recognize the importance of stress management as it relates to job performance.

06.23 Demonstrate an understanding of gender, age, disability, and cultural courtesy.

- 07.0 EXPLAIN AND PERFORM TELEPHONE ACTIVITIES UNIQUE TO CUSTOMER SERVICE--The student will be able to:
- 07.01 Demonstrate techniques for making a positive first impression or continue a positive relationship using the telephone (e.g., vocabulary, voice quality and tone, grammar, courteousness, rapport).
  - 07.02 Identify and demonstrate techniques of placing, answering, screening, placing on hold, and directing telephone calls.
  - 07.03 Identify and demonstrate procedures for recording and relaying accurate messages.
  - 07.04 Explain procedures for dealing with an obscene telephone call.
  - 07.05 Identify components of a customer service call.
  - 07.06 Demonstrate use of the telephone as a customer service tool to gather, receive, record, and convey accurate and complete information in a professional and courteous manner.
  - 07.07 Demonstrate active listening skills.
  - 07.08 Demonstrate ability to organize ideas and communicate oral messages appropriate to listener and situation.
  - 07.09 Review guidelines to inform customers of order receipt, prices, shipping date, and delays.
  - 07.10 Describe a positive and caring telephone voice.
  - 07.11 Demonstrate techniques for dealing with an irate or upset caller, remembering that "the customer is always right."
  - 07.12 Model the impact of facial expression on tone of voice.
  - 07.13 Explain importance of maintaining a telephone log.
  - 07.14 Demonstrate ability to maintain a telephone log accurately and in accordance with organization procedures.
  - 07.15 Demonstrate ability to access voice mail and record information accurately and neatly and note if response is required.
  - 07.16 Demonstrate ability to retrieve messages from an answering machine and record information accurately and neatly and note if response is required.
  - 07.17 Practice logging in and out of telephone systems.
- 08.0 IDENTIFY CUSTOMER SERVICE ACTIVITIES--The student will be able to:
- 08.01 Role-play appropriate customer greetings.
  - 08.02 Describe how an employee represents the firm to customers.
  - 08.03 Explain techniques to balance responsive telephone service with in-store service.
  - 08.04 Demonstrate ability to determine the individual customer's need for specific types of product support and customer services.
  - 08.05 Discuss the importance of suggestive selling of complimentary goods/services.
  - 08.06 Demonstrate knowledge of current and potential customer services offered by selected marketing organizations.
  - 08.07 Demonstrate ability to overcome objections.
  - 08.08 Explain role of customer mailing lists in the customer service industry.
  - 08.09 Role-play thanking the customer using appropriate English.
  - 08.10 Explain methods of observation that can be used to obtain customer's surname.
  - 08.11 Discuss importance of customer follow-up including those instances when writing a thank you note could be appropriate.

- 08.12 Describe techniques for identifying and satisfying customer needs/wants/problems.
  - 08.13 Explain techniques for determining customer merchandise/service interests.
  - 08.14 Discuss techniques for recognizing and responding to customer preference(s).
  - 08.15 Explain importance of listening to customer needs/wants/problems.
  - 08.16 Explain importance of product knowledge, features, and benefits to successful cross selling.
  - 08.17 Demonstrate ability to obtain customer commitment.
  - 08.18 Model methods of resolving customer complaints.
  - 08.19 Discuss importance of assisting customer in location of desired item(s).
  - 08.20 List abilities and qualities customers expect.
- 09.0 DEMONSTRATE JOB SEEKING AND EMPLOYABILITY SKILLS--The student will be able to:
- 09.01 Identify resources used in a customer service job search.
  - 09.02 Identify steps of the job application process including researching the company prior to an interview and obtaining proper documentation (e.g., green card).
  - 09.03 Locate company site on the Internet.
  - 09.04 Identify documentation needed prior to seeking employment.
  - 09.05 Discuss importance of drug tests and criminal background checks in identifying possible customer service employment opportunities.
  - 09.06 Demonstrate appropriate dress and grooming for employment.
  - 09.07 List documents an employer is required to have completed by an employee for payroll and eligibility purposes.
  - 09.08 Arrange for personal references.
  - 09.09 Prepare a neat, legible resume (traditional and electronic).
  - 09.10 Prepare a job application letter for a customer service position.
  - 09.11 Read and accurately complete job application forms for customer service positions.
  - 09.12 Participate in a behavioral job interview by role playing as an interviewer and an applicant.
  - 09.13 Demonstrate methods for handling illegal interview and application form questions.
  - 09.14 Compose a set of questions to ask of an interviewer.
  - 09.15 Participate in pre-employment testing (e.g., simulations, telephone interview, telephone screening).
  - 09.16 Conduct an interview follow-up.
  - 09.17 List procedures to follow when accepting an employment offer.
  - 09.18 Illustrate an understanding of the appropriate techniques to use when changing jobs.
  - 09.19 Describe appropriate methods for resigning from a position.
  - 09.20 Identify reasons for termination.
  - 09.21 Prepare a letter of resignation.
  - 09.22 Identify and demonstrate appropriate responses to feedback from supervisors.
  - 09.23 Identify and demonstrate acceptable work habits.
  - 09.24 Demonstrate acceptable health and hygiene habits.
  - 09.25 Discuss examples of company standards, policies, and procedures.
  - 09.26 Explain importance of following accepted rules, regulations,

- policies, and workplace safety guidelines.
  - 09.27 Describe importance of producing quality work and meeting performance standards.
  - 09.28 Describe implications of racial, ethnic, regional, educational, social, and age differences.
  - 09.29 Demonstrate attitudes and behaviors that eliminate stereotyping, gender bias, and recognize the value of cultural diversity.
  - 09.30 Demonstrate ability to work as a team member.
  - 09.31 Demonstrate a strong work ethic and a positive attitude both personally and professionally.
  - 09.32 Recognize the importance of the efficient use of materials and space on the job.
  - 09.33 Demonstrate an understanding of ethical business practices.
  - 09.34 Explain the importance of confidentiality in the workplace concerning any written, oral, or technically transmitted information pertaining to personnel, customers, or materials.
  - 09.35 Obtain letters of reference summarizing work/volunteer experiences.
- 10.0 DEVELOP A PLAN FOR A CAREER IN CUSTOMER SERVICE--The student will be able to:
- 10.01 Discuss the advantages and disadvantages of working in the customer service field.
  - 10.02 Identify personal qualities necessary to be successful as a customer service representative.
  - 10.03 Research a customer service occupation.
  - 10.04 Diagram a career path for the customer service associate.
  - 10.05 Write a job description for a customer service associate.
  - 10.06 Identify the educational requirements and work experience needed for a customer service associate.
  - 10.07 Identify personal qualities and skills necessary for job enhancement and career development in the customer service field.
  - 10.08 Develop forms of documentation for inclusion in a career portfolio, i.e., see DECA Guide.

Florida Department of Education  
STUDENT PERFORMANCE STANDARDS

Course Number: 8848120  
Course Title: Customer Service 2  
Course Credit: 1

**COURSE DESCRIPTION:**

This course provides instruction concerning the duties and responsibilities of a customer service specialist, the telephone activities performed by a customer service representative, customer relations activities, job seeking and employability skills, and developing a career plan for a career in customer service. At the completion of this course, the student will have met Occupational Completion Data Code B: Call Center Representative 2 - Industry Title.

02.0 DEMONSTRATE TECHNOLOGY LITERACY APPROPRIATE TO CUSTOMER SERVICE--  
The student will be able to:

- 02.11 Demonstrate computer literacy by producing documents generated by database and spreadsheet software.
- 02.12 Employ reference materials such as on-line help, vendor bulletin boards, tutorials, and manuals available for application software.
- 02.13 Employ computer networks (e.g., Internet, on-line databases, e-mail) to facilitate collaborative or individual learning and communication.

04.0 DEMONSTRATE COMMUNICATION SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:

- 04.12 Demonstrate techniques for writing letters and memorandums appropriate to the particular audience (e.g., management, customers, co-workers, manufacturers).
- 04.13 Monitor written, oral, and electronic sources of information and materials relevant to delivering accurate customer service.
- 04.14 Compose e-mail and business letters.
- 04.15 Demonstrate effective probing skills.

06.0 DESCRIBE CALL CENTER REPRESENTATIVE DUTIES AND RESPONSIBILITIES--  
The student will be able to:

- 06.24 Identify potentially difficult customers and strategies to meet their needs.
- 06.25 Explain differences between consumer rights and business responsibilities.
- 06.26 Explain differences between internal and external customers (e.g., productivity, motivation, commitment, and stress management vs. order taking, handling routine inquiries and application questions, and problem solving).
- 06.27 Exhibit how to interpret policies to internal and external customers.
- 06.28 Exhibit sensitivity to internal and external customer needs.



- 06.29 Classify customer services according to nature and characteristics of the activity.
  - 06.30 Classify customer services considered primary or essential and those considered secondary or optional.
  - 06.31 Review methods to resolve customer problems through clarifying, explaining policy/procedure, and coming to a consensus.
  - 06.32 Analyze the relationship between public relations and marketing.
  - 06.33 Demonstrate methods to initiate and maintain client account records.
  - 06.34 Prepare statements for clients.
- 07.0 EXPLAIN AND PERFORM TELEPHONE ACTIVITIES UNIQUE TO CUSTOMER SERVICE--The student will be able to:
- 07.17 Assume accountability for the technical and customer services provided during service calls.
  - 07.18 Demonstrate ability to maintain a file of addresses and telephone numbers.
- 08.0 IDENTIFY CUSTOMER SERVICE ACTIVITIES--The student will be able to:
- 08.10 Discuss importance of changing displays to maintain customer interest.
  - 08.11 Explain the concepts of market segmentation and niche marketing.
- 09.0 DEMONSTRATE JOB SEEKING AND EMPLOYABILITY SKILLS--The student will be able to:
- 09.36 Create and maintain an employability portfolio demonstrating awareness of personal abilities, interests, and skills as they relate to seeking employment.
  - 09.37 Identify qualities typically required for promotion and job advancement (e.g., productivity, dependability, initiative, responsibility).
  - 09.38 Practice providing direction and assistance to other team members by acting as a role model, coach, and motivator.
  - 09.39 Illustrate working independently with little supervision.
  - 09.40 Identify how to prepare for job separation and reemployment.
  - 09.41 Relate the importance of quality control in job performance (TQM).
  - 09.42 Participate in a job shadowing experience.
  - 09.43 Demonstrate knowledge of how to make job changes appropriately.
- 10.0 DEVELOP A PLAN FOR A CAREER IN CUSTOMER SERVICE--The student will be able to:
- 10.09 Prepare and implement an individual career and education plan for continuous career development.
- 11.0 DESCRIBE LEADERSHIP AND ORGANIZATIONAL SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE--The student will be able to:
- 11.01 Describe qualities of an effective leader.
  - 11.02 Describe different types of leadership.
  - 11.03 Identify and utilize the planning process.

- 11.04 Outline steps utilized in problem resolution when dealing with customers.
  - 11.05 Outline and apply steps used in decision-making when dealing with customers.
  - 11.06 Work cooperatively within a group to achieve organizational goals.
  - 11.07 Describe the role of the vision and mission statement in a customer service organization.
  - 11.08 Explain how innovation and efficiency impact the customer service organization.
  - 11.09 Display the ability to adjust behavior as appropriate to the situation, listening and responding with appropriate manners.
  - 11.10 Model personal responsibility for the welfare of others.
  - 11.11 Model appropriate technique for shaking hands as a professional.
- 12.0 UTILIZE EFFECTIVE TECHNIQUES AND PROCEDURES FOR SELLING CUSTOMER SERVICES--The student will be able to:
- 12.01 Demonstrate how to increase total sales volume by selling complementary services to the main product(s).
  - 12.02 Demonstrate knowledge of current and potential customer services offered by selected marketing organizations.
  - 12.03 Demonstrate the ability to determine the individual customer's need for specific types of product support customer services.
  - 12.04 Explain the "value added" concept as it applies to customer services.
  - 12.05 Evaluate ability to overcome objections.
  - 12.06 Demonstrate ability to identify and satisfy customer needs/wants/problems.
  - 12.07 Evaluate ability to obtain customer commitment.
  - 12.08 Identify and demonstrate cross-selling techniques.
  - 12.09 Explain the concept of "product" as an ingredient in the marketing mix.
  - 12.10 Explain the relationship of economic utilities and customer services.
- 13.0 DEMONSTRATE BASIC MATH OPERATIONS RELEVANT TO CUSTOMER SERVICE--The student will be able to:
- 13.01 Perform basic computational operations.
  - 13.02 Solve work-related problems using whole numbers, fractions, decimals, ratios, and percentages.
  - 13.03 Operate a 10-key keypad.
- 14.0 DEMONSTRATE AN UNDERSTANDING OF A CLIENT'S BUSINESS, POLICIES, AND PROCEDURES--The student will be able to:
- 14.01 Identify client's mission and objectives.
  - 14.02 Identify the type of business in which the client is engaged.
  - 14.03 Identify customer service guidelines.
  - 14.04 Identify procedure for logging in and out of client's system.
  - 14.05 Identify correct screen management techniques.
  - 14.06 Identify codes for different procedures.
  - 14.07 Identify data entry guidelines including procedure for error editing and correction.

- 14.08 Identify procedure to obtain assistance (i.e., help desk, on-line help).
- 14.09 Demonstrate ability to receive and process calls per client's guidelines.
- 14.10 Practice taking orders, requests, etc., as required by client.

Florida Department of Education  
STUDENT PERFORMANCE STANDARDS

Course Number: 8848130  
Course Title: Customer Service 3  
Course Credit: 1

**COURSE DESCRIPTION:**

The purpose of this course is to provide students with the competencies required for employment at the career specialist level in the customer service industry. Students will have met Occupational Completion Point Data Code C: Customer Care Representative - Industry Title.

13.0 DEMONSTRATE BASIC MATH OPERATIONS RELEVANT TO CUSTOMER SERVICES--  
The student will be able to:

13.04 Demonstrate correct procedures for handling major types of sales transactions.

13.05 Reconcile a customer account.

15.0 DEMONSTRATE HIGHER ORDER HUMAN RELATIONS SKILLS NECESSARY FOR SUCCESS IN CUSTOMER SERVICE OCCUPATIONS--The student will be able to:

15.01 Identify benefits of professional staff development (e.g., workshops, conferences, course work, and membership in professional associations).

15.02 Explain the need for employee evaluations, describe the procedures used in the evaluation process, and identify the consequences of positive or negative performance appraisals.

15.03 Describe methods used to compensate employees (e.g., wages, salary, commission).

15.04 Practice accurately answering call center representative questions on policies, procedures, and systems.

15.05 Practice guiding call center representatives through reference materials.

15.06 Practice monitoring and providing coaching and feedback to call center representatives.

15.07 Identify a variety of action plans to educate new hires.

16.0 DEMONSTRATE HIGHER ORDER ABILITY TO COMMUNICATE SKILLFULLY--The student will be able to:

16.01 Give oral reports to demonstrate the ability to express oneself in a concise, timely, and professional manner.

16.02 Demonstrate effective probing skills.

16.03 Demonstrate effective communication of impact of a business decision.

17.0 DEMONSTRATE AN AWARENESS OF MANAGEMENT FUNCTIONS AND ORGANIZATIONAL STRUCTURES--The student will be able to:

17.01 Identify the different levels of management.

- 17.02 Identify, compare, and contrast the various forms of business ownership (e.g., sole proprietorship, partnership, corporation, franchise) and other organizational structures (nonprofit organizations, government agencies).
  - 17.03 Compare and contrast the legal procedures and processes involved when establishing business ownership (e.g., sole proprietorship, partnership, limited partnership, joint ventures, limited partnership associations, registered partnerships with limited liability, limited liability corporation, corporation, franchise).
  - 17.04 Compare and contrast the advantages and disadvantages of each type of business ownership based upon complexity and risk of legal procedures and processes.
  - 17.05 Demonstrate knowledge of procedures, systems, and reference materials.
- 18.0 DEMONSTRATE AN UNDERSTANDING OF BASIC CONTRACTUAL OBLIGATIONS--The student will be able to:
- 18.01 Demonstrate an understanding of contractual relationships.
  - 18.02 Explain how an offer and acceptance can create contractual rights and duties.
  - 18.03 Identify people who lack contractual capacity.
  - 18.04 Describe breach of contract and the remedies available when a contract is breached.
  - 18.05 Define an agency relationship and list the ways that agency relationships may be created.
  - 18.06 Identify which applicants may be asked to participate in testing (e.g., aptitude, psychological, polygraph, drug).
- 19.0 PERFORM HIGHER ORDER KEYBOARDING ACTIVITIES AND USE OF OFFICE EQUIPMENT APPROPRIATE TO CUSTOMER SERVICE--The student will be able to:
- 19.01 Key and apply formatting principles.
  - 19.02 Obtain and transmit credit information.
  - 19.03 Perform basic computer operations.

Florida Department of Education  
STUDENT PERFORMANCE STANDARDS

Course Number: 8848140  
Course Title: Customer Service 4  
Course Credit: 1

**COURSE DESCRIPTION:**

The purpose of this course is to provide students with the skills and knowledge required for supervisory level and mid-management level employment in the customer service industry. Students will have met Occupational Completion Point Data Code D: Customer Care Coach - Industry Title.

20.0 ANALYZE IMPACT AND RELATIONSHIP OF GOVERNMENT REGULATIONS AND COMMUNITY INVOLVEMENT ON MANAGEMENT DECISIONS--The student will be able to:

- 20.01 Understand anti-trust laws and how they affect corporate behavior.
- 20.02 Describe the pros and cons of various levels of community involvement by a business.
- 20.03 Describe how tax policies affect a business.
- 20.04 Describe how licensure requirements affect a business.
- 20.05 Describe how government regulations affect a business.
- 20.06 Identify and evaluate various ways in which government affects business.

21.0 DEMONSTRATE AN ADVANCED ABILITY TO COMMUNICATE SKILLFULLY--The student will be able to:

- 21.01 Prepare a variety of categories/structures of messages.
- 21.02 Practice providing written/verbal feedback that is clear, concise, and professional.

22.0 UTILIZE HIGHER ORDER EFFECTIVE TECHNIQUES AND PROCEDURES FOR SELLING CUSTOMER SERVICES--The student will be able to:

- 22.01 Develop a written feature-benefit analysis sheet for a specified customer service.
- 22.02 Effectively critique a sales demonstration involving customer services.
- 22.03 Demonstrate effective suggestion selling techniques to solve client problems.
- 22.04 Develop an action plan to improve call center representative performance.

23.0 DEMONSTRATE HIGHER ORDER MATH OPERATIONS RELEVANT TO CUSTOMER SERVICES--The student will be able to:

- 23.01 Complete an invoice and purchase order return.
- 23.02 Calculate discount dates, due dates, and amount of payment.
- 23.03 Read charts and graphs.

- 23.04 Post debits and credits.
- 23.05 Calculate basis points.
- 24.0 PERFORM HIGHER ORDER KEYBOARDING ACTIVITIES AND USE OF OFFICE EQUIPMENT APPROPRIATE TO CUSTOMER SERVICE--The students will be able to:
  - 24.01 Obtain information, schedule, place orders, and route using e-mail, telephone, fax, Internet, and other communication and calculating devices.
- 25.0 DEMONSTRATE PERFORMANCE OF SUPERVISORY/MANAGEMENT FUNCTIONS--The student will be able to:
  - 25.01 Describe the functions of management (e.g., planning, organizing, staffing, directing, controlling) and discuss how functions are interrelated.
  - 25.02 Identify factors of strategic planning and define the role of strategic planning in a business environment.
  - 25.03 Demonstrate project management skills.
  - 25.04 Prepare training materials or update existing material.
  - 25.05 Dramatize handling elevated customer calls.
  - 25.06 Demonstrate ways to support team members to achieve personal and team goals.
  - 25.07 Identify relevant management information based on business' existing records.
  - 25.08 Identify appropriate information at various management decision-making levels.
  - 25.09 Identify appropriate applications for computer usage.
  - 25.10 Identify administrative tasks that would be the responsibility of the customer care coach.
- 26.0 OPERATE COMPUTERS AND OTHER EQUIPMENT APPROPRIATE TO MARKETING AND MANAGING CUSTOMER SERVICES--The student will be able to:
  - 26.01 Obtain and transmit credit information.
  - 26.02 Obtain information, schedule, place orders, and route using phone, fax, C.P.U., cash register, and other communications and calculating devices.
  - 26.03 Demonstrate merchandising and operations data entry procedures such as prices, sales, inventory changes, costs, and reductions.
- 27.0 DEMONSTRATE AN UNDERSTANDING OF BUSINESS OWNERSHIP--The student will be able to:
  - 27.01 Define entrepreneurship.
  - 27.02 List advantages and disadvantages of business ownership.
  - 27.03 Identify risks involved in ownership of a business.
  - 27.04 Identify the personal characteristics necessary to be a successful entrepreneur.
  - 27.05 Identify the business skills needed to operate a business efficiently and effectively.
  - 27.06 Define the purpose and identify and describe the major components of a business plan.
  - 27.07 Identify pros and cons of a home-based business.