Experiential Learning Portfolio for 10104191 Customer Service Management

Student Contact Information:

Name:_____Student ID#_____

Email: _____Phone:_____

It is highly recommended that you speak with the Academic Dean or instructor who teaches this course prior to completing a portfolio.

Directions

Consider your prior work, military, volunteer, education, training and/or other life experiences as they relate to each competency and its learning objectives. Courses with competencies that include speeches, oral presentations, or skill demonstrations may require scheduling face-to-face sessions. You can complete all of your work within this document using the same font, following the template format.

1. Complete the Student Contact Information at the top of this page.
2. Write an Introduction to the portfolio. Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.
3. Complete each "Describe your learning and experience with this competency" section in the space below each competency and its criteria and learning objectives. Focus on the following:
   - What did you learn?
   - How did you learn through your experience?
   - How has that learning impacted your work and/or life?
4. Compile all required and any suggested artifacts (documents and other products that demonstrate learning).
   - Label artifacts as noted in the competency
   - Scan paper artifacts
   - Provide links to video artifacts
   - Attach all artifacts to the end of the portfolio
5. Write a Conclusion for your portfolio. Briefly summarize how you have met the competencies.
6. Proofread. Overall appearance, organization, spelling, and grammar will be considered in the review of the portfolio.
7. Complete the Learning Source Table. Provide additional information on the business and industry, military, and/or volunteer experiences, training, and/or education or other prior learning you mentioned in your narrative for each competency on the Learning Source Table at the end of the portfolio. Complete this table as completely and accurately as possible.

The portfolio review process will begin when your completed portfolio and Credit for Prior Learning Form are submitted and nonrefundable processing fees are paid to your local Credit for Prior Learning contact. Contact Student Services for additional information.

Your portfolio will usually be evaluated within two weeks during the academic year; summer months may be an exception. You will receive an e-mail notification regarding the outcome of the portfolio review from the Credit for Prior Learning contact. NOTE: Submission of a portfolio does not guarantee that credit will be awarded.

You have 6 weeks to appeal any academic decision. See your student handbook for the complete process to appeal.

To receive credit for this course, you must receive "Met" on 9 of the 11 competencies.

10104191 Customer Service Management, 3 Associate Degree Credits

Course Description: This course equips learners to selectively hire, train, manage, and measure customer service providers as well as strategies to recover from difficult service situations. Topics include telephone/online etiquette, active listening, and problem solving. Best practices in handling complaints, controlling stress, and managing customer expectations will be explored. An examination of internal systems and policies that impact service to include customer relationship management software will be explored. This course is designed to help managers and supervisors of customer service representatives to increase customer satisfaction, loyalty, and profitability.

Introduction: **Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.**

Competency 1: Identify elements of effective customer service

Criteria: Performance will be satisfactory when:

- you detail qualities of businesses known for excellence in customer service
- you include a chart analyzing 10 "excellence in service" qualities
- the 10 "excellence in service" qualities include a word/phrase and minimum 3 sentence explanation defining the quality

Learning Objectives:

a. Review the importance of knowing your customer
b. Explain the characteristics of quality customer service
c. Defend the importance of positive attitude

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 2: Explore strategies for providing effective customer service
Criteria: Performance will be satisfactory when:
- you include 8 strategies of your personal service vision
- you include short words/phrases describing each strategy

Learning Objectives:
a. Identify key characteristics of implementing strategic direction
b. Recognize different approaches to strategizing
c. Develop standards for quality service performance

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 3: Measure the effectiveness of the service process

Criteria: Performance will be satisfactory when:

- you analyze 3 common service failures in the customer service industry
- your analysis includes descriptive stories of the failures
- your analysis pinpoints the root cause(s) for the service failures
- your analysis offers potential solutions to the service failures

Learning Objectives:

a. Investigate three tools to define quality customer service
b. Identify causes of service failures
c. Examine what steps can be taken to prevent service failures

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 4: Deliver effective customer service

Criteria: Performance will be satisfactory when:

- you critique the service process from a "secret shopper" experience
- you incorporate the elements of the delivery process in both B2C and B2B situations

Learning Objectives:

a. Identify basic steps in new service development
b. Identify elements in the delivery process
c. List various service design tools

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 5: Analyze the customer service process based on service process measurements

Criteria: Performance will be satisfactory when:

- you analyze the secret shopper experience involving 3 key strategies for measuring service: retention, conversion rate, and resolution time
- your analysis incorporates the story of the experience
- your analysis identifies specific strategies used to retain, convert, and resolve service issue

Learning Objectives:

a. Examine the challenges in providing quality service
b. Identify ways to focus on customer satisfaction
c. Monitor service process
d. Use performance indicators to measure service including retention, conversion rate, and resolution time

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 6: Cope with challenging customers
Criteria: Performance will be satisfactory when:
- you identify a minimum 5-step strategy for dealing with service failure
- you include details and examples of implementation plan for each step

Learning Objectives:
a. Determine the reasons that customers are challenging
b. Explain the basic tips to keep from creating challenging customers
c. Explain the productive nature of empathy
d. Examine what to do when you are in service failure with a customer

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 7: Coach others to deliver effective customer service

Criteria: Performance will be satisfactory when:

- you analyze a service-failure process
- you analyze the consumer behavior that is creating the service failure
- you analyze the presence/lack of good communication skills like active listening, paraphrasing, etc. to influence the customer toward resolution

Learning Objectives:

a. Explore consumer behavior of the modern customer
b. Analyze what makes a good service team
c. Develop influencing techniques that can be used in both business-to-consumer and business-to-business relationships
d. Explore customer service communication skills

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 8: Generate a customer service plan

Criteria: Performance will be satisfactory when:

- Portfolio includes elements of service plan including 10 excellence in service qualities, 8 strategies of personal service vision, 5-step strategy for dealing with service failure, and coaching plan
- Portfolio provides description and analysis of the included portfolio artifacts
- Portfolio content is creative, professional, and error free

Learning Objectives:

a. Express the fundamental requirements of creating a successful customer service plan
b. Analyze customer service plans
c. Determine the use for customer service plans
d. Write a service plan
e. Implement a service plan

Required Artifacts: Portfolio
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 9: Recognize the changing role of management when providing effective customer service

Criteria: Performance will be satisfactory when:

- you analyze the level of empowerment in a situation
- you analyze correct procedure for involving management in a service situation

Learning Objectives:

a. Identify the importance of service
b. Support empowerment
c. Distinguish between functions, styles, and roles of managers
d. Identify the managerial implications for service organizations
e. Evaluate why organizations often fail to involve and empower employees in the service culture
f. Create a procedure for the appropriate time to involve management

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 10: Train staff to deliver the customer service process

Criteria: Performance will be satisfactory when:

- you explain 10 elements of a customer service training session

Learning Objectives:

a. Examine the role of managers in recruiting service focused employees
b. Identify the steps in the training process
c. Develop a training session
d. Critique a training session
e. Create measurements for Return on Investment

Required Artifacts: Customer Service Training Session Presentation and Materials
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 11: Sustain effective service culture through the continuous improvement process

Criteria: Performance will be satisfactory when:

- you conduct a SWOT analysis for a company culture, customer service strategies, and management styles
- you identify areas for continuous improvement needs
- you create performance dashboard criteria and strategies to monitor improved customer service

Learning Objectives:

a. Implement a SWOT analysis
b. Identify steps for ongoing improvement
c. Analyze the need for alignment of culture, strategy, and management
d. Incorporate the use of performance dashboards to monitor customer service quality

Required Artifacts: None
Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Conclusion: Summarize how you have met the competencies of the course.

Learning Source Table

Learning Source (name of employer, training, military, volunteer organization, etc.)	Supervisor	Start-End Date	Total Hours	Related Competencies
Ex: XYZ Corporation	Bucky Badger	8/2012-9/2014	2000	#1, 2, 3, and 7