

**ACTION-BASED ACTIVITIES**

**TOPIC C5.2 : CUSTOMER/CLIENT CARE**

**THEME C5 EDUCATION & TRAINING**



**COMMUNICATION**

**LEVELS 1 & 2**

**ISSUED SEPTEMBER 2005**

# INSTRUCTIONS

## WHAT DO I DO?

Use this booklet to help you:

- plan an Action-based Activity on the theme of Education & Training
- carry out an investigation into the subject
- produce ALL the evidence needed for your portfolio.

**NOTE:** Use this booklet WITH the Learner's Planner and Guide.

## WHAT IS ASSESSED?

*Education & Training* is one of six themes you can choose for your Action-based Activity/portfolio work. It includes topics such as:

- C5.1 Working Outdoors
- C5.2 CUSTOMER/CLIENT CARE
- C5.3 Health & Safety at Work

COMMUNICATION

TOPIC C5.2 : CUSTOMER/CLIENT CARE

### TOPIC C5.2 CUSTOMER/CLIENT CARE

*Customer and Client Care* is a hugely important part of most businesses and it is a big subject. If you want to study it, you will need to narrow it down. This guide will take you step by step from how to get started to writing and checking your final piece of work. Each step follows Part Two of your *Student Planner & Guide*, so read it alongside this booklet.



It's a good idea to follow this advice.



You must do this to get the qualification.



**STEP  
A**



### CHOOSING A TOPIC

Think about the topic "*Customer or Client Care*" and things about it that you might like to study. Don't rush or you may miss something. One of the best ways to start is to *mindmap*.

### TASK 1 GETTING STARTED MAKING A MINDMAP

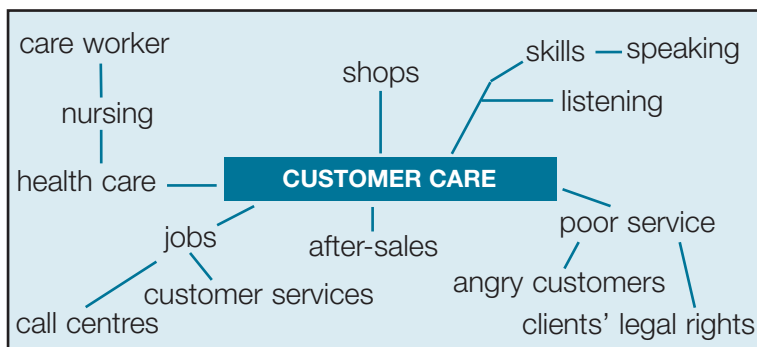
Allow about  
20 minutes

On your own, or with a colleague, think about and talk about 'caring for customers or clients' and aspects of it you might like to study.

Work together to make a **mindmap** of the subject. You can find how to do this on page 5 of the *Learner's Planner & Guide*. You may want to think about:

- what customer care involves – e.g. meeting people, communication; politeness
- the skills needed – speaking, listening, writing, others
- training opportunities
- the difference good service makes to you personally
- care in the health sector (e.g. nursing)
- after-sales service.

**PORTFOLIO EVIDENCE** – You could copy and add to the unfinished example below. This could then go into your portfolio as evidence that you have thought about your chosen subject.



**ESSENTIAL SKILLS**  
**ACTION BASED ACTIVITIES**



*Continued*

**TASK 2 FRAMING A QUESTION**

Allow about 15 minutes

When you have made your mindmap, focus in on one or two ideas that:

- interest you
- will be easy to research and get information about (talk to your tutor if you are unsure).

Write these ideas down and then try to turn them into **QUESTIONS**. This will help when you write up your conclusions later. The examples in the box may help you do this.



**Topic : Customer and Client Care**

Original Idea	Question
<b>Customer satisfaction</b>	Are people satisfied with the service they get in shops?
<b>Careers in customer care</b>	What career opportunities are there in customer/client care?
<b>Skills and qualities</b>	What skills and qualities are needed for someone providing customer or client care?

In your portfolio, write down your chosen title/question.

Check with your tutor that it is okay. (Remember, you can always change it later if necessary.)

**TASK 3 LOCATING RELEVANT INFORMATION**

Allow about 10 minutes

Your next task is to locate relevant information for your portfolio. Check with your tutor that:

- there is enough information
- it is easily located
- it is of the right standard

**TASK 4 ACTION PLANNING**

Allow about 30 minutes



**PLAN** – It's a good idea next to draw up a plan of action. Make a table and on it write down what you intend to do and when you will do it by. Highlight key dates and deadlines (e.g. when you are giving a talk or having a discussion).

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**TOPIC C5.2 : CUSTOMER/CLIENT CARE**

**STEP  
B**



### READING TO OBTAIN INFORMATION

Reading and obtaining information are an essential part of the qualification and you must be able to show that you have collected, read and extracted information for **DIFFERENT** sorts of documents.

There are lots of ways of finding information on this subject such as:

- books and other resources in the local library
- magazines (e.g. nursing, retailing) and newspapers
- using the Internet
- advertisements
- carrying out a survey

#### TASK 5 READING AND FINDING OUT (to answer your question)

Allow about  
1½ hours

Look for suitable documents to read. If you are studying for **level 2** communication skills they will need to be more than 500 words long.

#### TASK 6 RECORDING INFORMATION

Allow about  
1½ hours

**READ and MAKE NOTES** from all documents that you think are helpful and relevant (the box below shows you how to write your notes).



**Topic: 'What customer services might a business provide?'**

**Title of article read:** *'The customer comes first'*

**Date:** 28 November 2003

**Author:** Jodi Black

**Length of article:** 634 words

**Main points in the article:**

1. Customer services provide information to clients.
2. Customer Care may also include advice (e.g. on-line help).
3. After sales is vitally important in customer/client care.
4. The old saying still holds good – "the customer is always right!"
5. Training is essential before anyone takes up a career in customer care.

**Summary:** Write up your notes in your own words.  
**This is a major piece of evidence.**



**ASSESSMENT** Your tutor will assess that:

- the notes you have made are relevant
- you have clearly identified key points
- you understand what you have read.

**STEP  
C**



**DISCUSSIONS**

Taking part in discussions is an essential part of the qualification. For **LEVEL 1** you can take part in a one-to-one **OR** a group discussion. At **LEVEL 2**, it must be a group discussion. A discussion can be on any topic from the six Themes (See *Learner’s Planner & Guide*, page 10).

Your **tutor** will need to observe and assess how well you do.

**TASK 7**

**TAKING PART IN DISCUSSIONS ABOUT YOUR TOPIC**

Allow about  
1 hour

1. **Invite** colleagues to join you in a discussion about your chosen topic and fix a time and date when you will meet. Make sure your tutor is also able to be there if you want to be assessed.
2. **Plan** and practise for the discussion so you are properly prepared (see the box below).



**PLANNING AND TAKING PART IN DISCUSSIONS**

1. Think about what you will talk about – it’s no good just having a chat! The discussion must be focussed on the subject.
2. Decide on a subject and a question to discuss e.g. *“There are more and more cases of customers and clients suing when things go wrong – is this good or bad?”*
3. Agree a time and place for the discussion.
4. Set aside 15–20 minutes for the meeting.
5. Make sure your tutor is there to assess it.



**ASSESSMENT** Your tutor will assess you on:

- speaking clearly
- keeping to the point
- giving relevant information
- listening to others
- using positive body language
- keeping the discussion going.

**STEP  
D**



### GIVING A TALK (Level 2 only)

At level 2 you must give a short talk to an audience (see your *Learner's Planner & Guide*, page 21 for detailed tips on how to give a good talk).



Although there are no hard and fast rules, a talk will normally follow the format given in the box below (in this case on the topic of "Client Care in Health and Social Care Services")

It is a good idea to prepare prompt cards and material (e.g. pictures, PowerPoint etc) to illustrate your talk.



1. Think up a **title** e.g. "**Caring for People**"
2. **Introduction** – *"My talk is about caring for people in hospitals, surgeries and care homes. I will talk about my own research and experience and the skills and qualities that are needed for this kind of work?"*
3. **Main section** – take each of the points in 2 and expand them.
4. **Conclusion** – *"So, I hope that you enjoyed my talk and will perhaps remember a few of my main points if you are unlucky to go to hospital ..."*
5. **Questions** – *"Are there any questions or observations you would like to make?"*

### TASK 8

Allow about  
2 hours

### GIVING A TALK OF AT LEAST 4 MINUTES ABOUT YOUR TOPIC

**Note: This task is only relevant if you are doing level 2.**

Plan and prepare for your talk. Make sure the time and date is fixed and that your tutor can be there to assess it. Practise at home – it really does help!



**ASSESSMENT** Your tutor will assess you on:

- speaking and making your case clearly
- keeping to the point
- giving relevant information
- being well organised
- using positive body language
- answering questions clearly.

**ESSENTIAL SKILLS**

**ACTION BASED ACTIVITIES**

**STEP  
E**



**PLANNING AND WRITING DOCUMENTS**

Your portfolio must contain at least two different written or word-processed documents (see pages 12–13 in your *Learner’s Planner & Guide*). At level 2, one of them must be over 500 words long.

**TASK 9**

Allow about  
2 hours

**PLANNING AND WRITING ONE TYPE OF DOCUMENT ON YOUR CHOSEN TOPIC**

1. Check what you already have in your portfolio. You should have notes of documents you have read and information gathered. You may find that you have already written a letter or short report which you can use as evidence of writing!
2. Decide on **one** type of document you will produce. For example, you might include a report of work experience you have had or a survey of people’s views on the service they get in shops.



**EXAMPLES OF DOCUMENTS YOU MIGHT WRITE ON ‘CARING’**

**Short documents:**

- a letter or email telling someone about your experience working in care or serving the public
- a leaflet on the ‘golden rules’ of customer care
- a short report on a survey of the quality of service in a store.

**Longer documents:**

- a guide for customers and clients on their legal rights
- a full report on a survey you carried out on care services
- a wall display on quality care.

3. Start **WRITING** one type of document on your chosen topic. You are strongly advised to use a computer to do this as this will:
  - enable you to redraft work quickly and easily
  - make your work look more professional
  - make spell checking easy
  - provide opportunities to include images, tables, charts, graphs etc. – you **MUST** include an **image**.
4. **PROOF READ** your work carefully.

**COMMUNICATION**

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# ESSENTIAL SKILLS

## ACTION BASED ACTIVITIES



**ASSESSMENT** Your tutor will assess your work for:

- its relevance – sticking to the point
- its structure – it must be organised
- its style – easy to read and suited to the job

### **TASK 10** PLANNING AND WRITING A DIFFERENT TYPE OF DOCUMENT ON YOUR CHOSEN TOPIC

Allow about  
2 hours

Repeat Task 9 for a different type of document on your chosen topic.



### **COMPILING THE FINAL PORTFOLIO**

### **TASK 11** THE FINAL PORTFOLIO OF EVIDENCE

Gather together all your work and select from it the evidence needed to meet the requirements of the qualification.

(Your tutor will help you with this task).



### **CUSTOMER AND CLIENT CARE MORE ACTION-BASED ACTIVITY IDEAS**

1. Carry out a survey to find out what people think of the service they get in different shops in the High Street. You will need a questionnaire.
2. Carry out an investigation into the quality of care people have received from the health services. You will need to create an interview script before you arrange interviews.
3. Contact and visit a large store (e.g. supermarket, department store) and interview members of the personnel department on customer care and staff training.
4. Carry out research into a possible career in the care service or customer service industries to include finding out about types of work, skills and qualities needed, qualifications required etc.
5. Plan a visit to a hospital or care centre and observe and interview staff about their work and their responsibilities as carers. Find out about clients' rights and the rules about how patients and clients should be treated.
6. Research into the way in which the care or service industries have changed in the past 100 years and decide whether the changes have been for better or worse. You might interview elderly people for their views.
7. Apply for a post in working with customers or clients (it could be in an office, bank, shop, care home or similar). Check advertisements, select one or two and write off for information. Write letters, a CV and complete application forms.
8. Watch a number of soaps on TV that involve some form of client or customer care. Keep a record of how they dealt with people. Draw up a set of guidelines on how to treat customers and clients on the basis of what you viewed. Can you compare this with 'real life'?





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