

Customer Service

Exam Information	Description
Exam number 403 Items 34 National Career Cluster Business Management & Administration Certification available Yes	The Customer Service industry certification exam assesses an understanding of the skills, aptitudes, and thought processes necessary to achieve customer satisfaction and loyalty in a variety of settings. It evaluates customer service strategies, including the skills and abilities necessary for working with customers, assisting them in making decisions, and resolving concerns and issues that may arise.

Exam Blueprint and Performance Skills

Standard	Percentage of exam score
1. Customer Service	13%
2. Target Market	15%
3. Soft Skills	35%
4. Customer Rapport And Personal Inventory	10%
5. Omnichannel Resources	13%
6. Customer Satisfaction	15%
7. Pathways, Post Secondary, And Careers (optional)	0%

*Includes performance skill evaluation

Standard 1 - Customer Service

Candidates will explore job opportunities in client and sales representative careers.

Objective 1 Determine the necessary education, training, experience, and potential salaries of this job outlook.

1. Discuss career opportunities in your local area that are available in the service industry. That is both high demand and high wages.
2. Define the following terms and concepts:
 - a. Customer Service: the assistance and advice provided by a company to those people who buy or use its products or services.
 - b. CX/Customer Experience: is the internal and subjective response customers have to any direct or indirect contact with a company.
 - c. Client Care: is the process of looking after customers to best ensure their satisfaction and delightful interaction with a business
 - d. Account/Client Representative: someone who is responsible for customer or client accounts.
 - e. Customer-Focused Organization: a business that operates completely around its relationships with clients and client satisfaction. Decisions are made based more on the needs and wants of customers, rather than technical or sales operations.
3. Discuss how customer service is expanding through emerging opportunities in different industries.
 - a. Subscription-Based Industries: Stitch Fix, Hellofresh, Spotify, Birchbox
 - b. Convenience and Delivery Industries: In-store pickup, curbside pickup, ordering online or through an app. Examples (DoorDash, Uber, Postmates)
 - c. Call and Chat Centers
 - d. Retail: selling goods to the public both through a physical store, online, apps, or through social media platforms.
 - e. Omnichannel Retailing: defined as an approach to sales that focus on providing a seamless customer experience whether the client is shopping online from a mobile device, a laptop or in a brick-and-mortar store
 - f. Wholesale: Business to Business sales
 - g. Service Industries: beauty, medical, hospitality and tourism, lodging and recreation, and sports/ entertainment

Objective 2 Candidates will understand customer satisfaction; what it is, and how it can be measured from both customer and company perspectives.

1. Discuss and Define the following:
 - a. Customer Satisfaction: a measurement that determines how happy customers are with a company's products, services, and capabilities.
 - b. Customer Perspective: Customers are always looking for opportunities to improve their situation. Often they value three main ideas: speed, quality, and price.
 - c. Company Perspective: Companies are always looking to maximize profits and maintain repeat business while ensuring customer satisfaction.

Optional: Standard performance evaluations on the final page of this document

Standard 2 - Target Market

Candidates will identify and understand how to determine the target market for a variety of sales and service industries.

Objective 1 Identify and explain the importance of a customer profile defined as a detailed description of your current customers.

1. Explain how customer profiles help to determine a specific industry or organization's target market. Discuss how customer profiles are used to decide where to spend your promotional dollars.
2. Identify and explain how a customer profile can help obtain new customers or retain existing customers
3. Describe how organizations use a customer profile through market segmentation.
 - a. Demographic: Who? (Personal characteristics such as Age, Gender, Income Level, Education Level, Race, and Ethnicity)
 - b. Psychographics/Interests: Why? (Involves grouping people with similar lifestyles, as well as shared attitudes, values, and opinions such as Activities, Attitudes, Personality & Values)
 - c. Geographics/Location: Where? (Segmentation based on where people live such as Natural or Political Boundaries, Climate, Cultural influences, and Customs)
 - d. Behavioral: How? (Looking at the benefits desired by consumers such as shopping patterns, usage rate, benefits--and not just the physical characteristics of a product)
4. Discuss customer expectations based on the market segmentation. Here are the starting points of discussion for each market segmentation.
 - a. Demographic: High-income customers would expect a higher-quality product
 - b. Psychographic: Conservative customers will expect that a company supports conservative causes both politically in their company culture.
 - c. Geographic: Customs of an area would be respected in all communications while building customer rapport.
 - d. Behavioral: Loyal customers might expect more out of an experience.
5. Identify the processes used in client prospecting
 - a. Research your Leads
 - b. Qualify your leads
 - c. Identify your leads
 - d. Prioritize your decision maker
 - e. Reach out and schedule a meeting with the decision maker
6. Discuss and identify key components of omni-channel customer service.
 - a. Chat box, delivery, in-person, online, social media, and word of mouth through reviews online and in-person.

Optional: Standard performance evaluations on the final page of this document

Standard 3 - Customer Service Soft Skills

Candidates will discover & develop critical aptitudes and “soft skills” in sales and service careers.

Objective 1 Identify and discuss customer service traits and behaviors needed to provide excellent customer service.

1. Follow directions from employers to provide relevant information from company policies. Employees should always advocate the employer’s interest.
2. Communicate clearly and provide step-by-step instructions if a customer-involved solution is required.
3. Ask meaningful questions and focus on solutions that both the customer and your employer can agree on.
4. Represent professionalism on and off the job. Use appropriate language and customer-centered vocabulary. Keep emotions in check.
5. Provide a timely and accurate response to all customer questions.

Objective 2 Identify and discuss empathy and professionalism needed in effective customer service.

1. Discuss ways to show empathy, the action of understanding, being sensitive, and vicariously experiencing the feelings, thoughts, and experiences of another.
 - a. Show respect for the customer by giving them your undivided attention, listening carefully, and acknowledging customers’ questions and concerns through active listening skills. (See the following standard)
 - b. Build a relationship of trust through related experiences and showing sincere appreciation for the customer's concerns.
2. Clearly illustrate the soft skill of professionalism including;
 - a. Clean and well-kept attire appropriate for the specific work environment.
 - b. Easy distinction between employees and customers.
 - c. Confidence and poise.
 - d. Positive and helpful attitude.

Objective 3 Discuss effective communication skills to ensure a positive customer service experience. Describe the importance of language in effective communication skills.

1. Explain that verbal skills are important in building credibility and to convey product knowledge to customers
2. Verbal skills used to build credibility:
 - a. Limit filler words that make you seem like you are trying to remember facts or details. (Ex. uh, um, like, and y’know)
 - b. Voice Inflection: a manner of speaking in which the loudness or pitch or tone of the voice is modified
 - c. Pronounce words correctly and avoid made-up words such as Irregardless, anyways, towards, search up, supposably, and Should of.

- d. Appropriate word choice (i.e. avoiding slang, jargon, non- positive words such as can't, won't, wouldn't, no)
 - e. Compare denotation v. connotation. Words that have a different literal definition, versus their figurative meaning.
3. Explain both negative and positive examples of Non-Verbal skills in customer service communication.
- a. Eye Contact
 - i. Negative - avoiding your customer or looking outside your sales space
 - ii. Positive - looking back at your customer's face and at your products
 - b. Facial Expressions and Smiling
 - i. Negative - closed, firm, or expressionless mouth, eating or chewing gum while communicating
 - ii. Positive - smiling or relaxed mouth
 - c. Body Language and Posture
 - i. Negative - slouching, shoulders turned away
 - ii. Positive - standing upright, inclining the body forward
 - d. Proxemic Distances
 - i. Intimate: 0-2 feet, spouse, family,
 - ii. Personal: 2-4 feet, friends
 - iii. Social: 4-12 feet, acquaintances
 - iv. Public: 12 feet, strangers
 - e. Gestures
 - i. Negative - closed arms, dismissive hand gestures, hands folded to the chest or near the face
 - ii. Positive - open arms, nodding the head, hands moving freely, relaxed, touching the product.

Objective 4 Explain that listening skills are the most needed yet underused skill for effective communication in customer service.

- 1. Define the following and explain in detail with examples from customer service situations.
- 2. Active listening in customer service:
 - a. Pay attention through eye contact and body language
 - b. Show that you're listening through facial expressions and gestures such as head nodding and leaning forward.
 - c. Provide feedback by repeating back what you heard in your own words and by asking clarifying questions.
 - d. Defer judgment, be patient, and do not interrupt the customer.
 - e. Respond appropriately by keeping your emotions level and voice calm. Provide accurate and quick information on how the conflict will be resolved.
- 3. Passive Listening: listening without responding to the speaker. For example during a lecture or a keynote speaker where interaction is not expected.
- 4. Negative Listening:
 - a. Pseudolistening - Putting on a facade when it comes to actual listening. Faking like you're listening when in reality you've got other things on your mind.
 - b. Selective Listening - Having a bias for or against a person, or a topic, that makes you selective in what you retain. People pay attention to things they find interesting and ignore things they do not.

- c. Superficial Listening - Paying attention to details not relevant to the situation. Missing the larger message that a person is saying
 - d. Defensive Listening - Already planning what you will be saying to someone before they've finished speaking. Becoming a "one-upper" and having a cognitive response made up before they finish.
 - e. Disruptive Listening - Constantly interrupting people while they are speaking. Going out of your way verbally/nonverbally to show someone that you're not listening to them.
5. Listening v. Retaining.
- a. Explain the difference between listening and retaining information to be able to recall and deliver in the future.

Optional: Standard performance evaluations on the final page of this document

Standard 4 - Customer Rapport And Personal Inventory

Candidates will identify and understand how to determine the target market for a variety of sales and service industries.

Objective 1 Describe the steps to building customer rapport.

- 1. Opening: greeting by acknowledging the customer quickly with a friendly demeanor
- 2. Discovery: questioning through active listening
- 3. Resolution: through clarifying, paraphrasing, and summarizing
- 4. Ownership: employee empowerment by clearly defining what the employee is allowed and limited to do in resolving issues. Employees own the process of finding solutions.

Objective 2 Explore and understand the aptitudes needed in the customer service process.

- 1. Personality traits and aptitude
 - a. Explain the idea of personality tests and how they are used as means of filtering personalities that may not be well suited to customer service.

Objective 3 Describe the importance of customer service aptitudes and traits in demonstrating product knowledge.

- 1. Assess how certain aptitudes may hinder or encourage an employee's ability to develop a strong base of product/service knowledge.
- 2. Identify common online KPIs (Key Performance Indicators) to measure customer satisfaction. (Cstat, testimonials, Net promoter Rating, Customer Service Reviews)

Optional: Standard performance evaluations on the final page of this document

Standard 5 - Omnichannel Resources

Candidates will understand omnichannel resources, an approach to sales that focus on providing seamless customer experience whether the client is shopping online from a mobile device, a laptop, or in a brick-and-mortar store used to enhance customer experiences.



Objective 1 Candidates will identify resources to communicate with customers.

1. Identify tools to communicate with customers and the effectiveness of these tools in different industries.
 - a. Phone: inbound, outbound, notification, and text messaging
 - b. Electronic: e-mail, surveys, online rating/reviews, and chatbots
 - c. Print Mediums: flyers, catalogs, postcards, and billboards
 - d. Broadcast: TV, radio, and video platforms
 - e. Digital Marketing Platforms/ Social Media sites: in-app ads, push notifications, online reviews, and payment methods
 - f. Other methods of communication

Objective 2 Candidates will understand the use of CRM as it relates to the customer service experience.

1. Define CRM: Customer Relationship Management System is a technology for managing all your company's relationships and interactions with customers and potential customers.
2. Share examples and research current CRM platforms.
 - a. What customer service features do they provide
 - b. How do these features translate into a better customer experience
 - c. Explain how CRM systems contribute to an organization's productivity

Objective 3 Candidates will understand the impact confidentiality has on reputation and goodwill in customer service

1. Identify reasons for customers to expect privacy in a variety of service settings (ex. health, service, travel/tourism, and sports/entertainment)
2. Investigate the need for security measures to protect information gathered and maintained by companies.
 - a. Protection of personnel records
 - b. Protection of business records
 - c. Protection of customer information
 - d. Internal (leaking information) and external (hacking) threats

Optional: Standard performance evaluations on the final page of this document

Standard 6 - Customer Satisfaction

Candidates will evaluate, develop, and measure customer loyalty and customer satisfaction.

Objective 1 Define and explain the importance of customer satisfaction, loyalty, and the need to be able to calculate customer lifetime value.

1. Customer Satisfaction: a measurement that determines how happy customers are with a company's products, services, and capabilities.
2. Customer Loyalty: an ongoing emotional relationship between you and your customer, manifesting itself by how willing a customer is to engage with and repeatedly purchase from you versus your competitors.
3. Customer Lifetime Value (CLV) - The total revenue earned by the entire relationship (including future purchases) with a customer.

Objective 2 Identify reasons a company would utilize resources to enhance customer experiences.

1. Identify ways a company could increase/decrease sales by customers experiencing positive/negative interaction.
 - a. Word-of-mouth, customer loyalty, referrals, goodwill (the value found in your company's good name and recognition value), poor reviews, forums, and rate of use.
2. Describe the benefits and ethical implementation of using a "secret shopper" program to ensure the quality of customer service provided.

Objective 3 Improving customer satisfaction.

1. Identify and understand the implementation and use of common loyalty programs.
 - a. Points for purchase
 - b. Tiered rewards

- c. Memberships (free and paid)
- d. Humanitarian causes (donation of money or goods to a charity/cause for customer purchase)
- e. Partnering with other companies/causes
- f. Games/sweepstakes (both purchase and no purchase necessary)

Optional: Standard performance evaluations on the final page of this document

Standard 7 - Pathways, Post Secondary, and Careers in Customer Service

Candidates will understand the post-secondary and career opportunities available in Customer Service.

Performance Skills Evaluation

Exam name: Customer Service

Candidate Name: _____

Performance assessments may be completed and evaluated any time before the certification is issued. The following performance skills can be used in connection with the associated standards and exam. The evaluator will function as the subject matter expert to determine if the candidate meets the skills requirements with a Yes/No for passing.

Standard 1 – Customer Service Use critical thinking to complete a job exploration project. Choose a client or customer care career and include all of the following: education, salary, training, and/or experience.	Pass:
Standard 2 – Target Market Use problem-solving skills to define the ideal customer profile. Solve a business problem through exploring a DECA or FBLA role play or use a case study from a recent current event.	Pass:
Standard 3 – Soft Skills - Participate in a listening self-assessment. Create a list of terms or ideas on a product or service that students need to memorize and retell without cues or notes. - Practice customer service communication skills by participating in an individual or team role play from DECA or FBLA that has a customer service scenario.	Pass:
Standard 4 – Customer Rapport and Personal Inventory Complete a free customer service aptitude test online (Preferably the Big 5 aptitude test). Have students create a SMART goal for improving their score in an area where they may need improvement.	Pass:
Standard 6 – Customer Satisfaction - Students should select a company from an industry he/she is interested in. Research and evaluate a current customer service program for selected companies and suggest changes to increase clarity, efficiency of employees, or achievement of customer service goals. - Students will analyze a case study that asks them to problem-solve a negative customer service interaction. Case studies can be found in either DECA or FBLA resources.	Pass:
Standard 7 – Pathways, Post Secondary, and Careers	Pass:

- Complete a free customer service aptitude test online (Preferably the Big 5 aptitude test). Have students create a SMART goal for improving their score in an area where they may need improvement.

Evaluator Name:

Date: