

Third Party Reports

The Third Party Report should be completed by a senior member of staff i.e. a supervisor or manager, where possible. The report should cover the points below, with a description to show that the tasks have been witnessed over time, while working with the learner. Examples, times, dates etc. should be included, if possible.

As this unit is about processing customer complaints you will need to have witnessed the learner within a working or training environment:

1. Responding to complaints
2. Referring complaints
3. Exercising judgement to resolve customer service issues.

Ticking yes/no next to the tasks is required, as well as an accompanying report.

Third Party Checklist

Candidate's Name	Gemma Martin	
Assessor or Observer's Name	Grace Martin	
Unit of Competence (Code and Title)	BSBCMM301 - Process Customer Complaints	
Date of Assessment		
Location		
Demonstration Tasks		
Materials and Equipment		
Tasks to be simulated if not witnessed over time:	Yes	No
1. Did the learner process <i>customer complaints</i> using <i>effective communication</i> according to organisational procedures established under organisational policies, legislation or codes of practice?	✓	
2. Did the learner obtain, <i>document and review reports relating to customer complaints</i> ?	✓	
3. Did the learner make decisions about customer complaints, taking into account applicable legislation, organisational policies and codes?	✓	
4. Did the learner negotiate resolution of the complaint and obtain agreement where possible?	✓	
5. Did the learner maintain a register of complaints/disputes?	✓	
6. Did the learner inform customer of the outcome of the investigation?	✓	
7. Did the learner identify complaints that require referral to other personnel or external bodies?	✓	
8. Did the learner make <i>referrals</i> to appropriate personnel for follow-up in accordance with individual level of responsibility?	✓	
9. Did the learner forward all documents and investigation reports?	✓	
10. Did the learner follow-up appropriate personnel to gain prompt decisions?	✓	
11. Did the learner identify implications of issues for customer and organisation?	✓	
12. Did the learner analyse, explain and negotiate appropriate options for resolution with customer?	✓	

13. Did the learner propose viable options in accordance with appropriate legislative requirements and enterprise policies?	✓	
14. Did the learner ensure matters for which a solution cannot be negotiated are referred to appropriate personnel?	✓	
The candidate's performance was:	Not Satisfactory	Satisfactory ✓
Further comments: Gemma can take complaints & rectification requests. Record information & issue the details to appropriate stakeholder & monitor the required actions to make sure the issue is rectified, to satisfy all parties, before signing off.		
Candidate's Signature		
Assessor/Observer's Signature		

Third Party Evidence

Name of Candidate	Gemma Martin	Confidential Information
RTO:		
Unit(s) of Competence		

As part of the assessment for the units of competency, we are seeking evidence to support a judgment about the candidate's competence. As part of the evidence of competence we are seeking reports from the supervisor and other people who work closely with the candidate.

Name of the supervisor:	Grace Martin
Workplace:	RHM Building Innovations
Address:	117 Mt Lindesay Hwy
Phone:	0423267868 Geneagle.

Do you understand which evidence/tasks the candidate has provided/performed that you are required to comment on?

☒ Yes

No

As the assessor explains the purpose of the candidates assessment?

Yes

☒ No

Are you aware that the candidate will see a copy of this form?

☒ Yes

No

Are you willing to be contacted should further verification of this statement be required?

☒ Yes

No

What is your relationship to the candidate?	Employer - Supervisor
How long have you worked with the person being assessed?	3 years
How closely do you work with the candidate in the area being assessed?	Directly
What is your technical experience and/or qualification (s) in the area being assessed? (Include any assessment or training qualifications.)	Business Manager

Does the candidate:

Perform tasks to the industry standards?	☒ Yes	No
Managed job tasks effectively?	☒ Yes	No
Implement safe working practices?	☒ Yes	No
Solve problems on the job?	☒ Yes	No
Work well with others?	☒ Yes	No
Add that to new tasks?	☒ Yes	No
With unusual or non-routine situations?	☒ Yes	No

Overall do you believe the candidate conforms to the standard required by the unit of competency on a consistent basis?

Yes, Gemma is competent in this area.

Identify any training needs for the candidate:

N/A

Any other comments: