

Task 3:

Creating a Personal Development Plan

To complete this task you will need to create a Personal Development Plan that will cover the period of time you are completing your programme. As part of this you will need to describe your position within your team and what your individual targets and goals will be as part of this role.

When completing this task, you will need to:

- make a list of the responsibilities you have in your customer service role
- explain how your actions impact on others in your organisation
- complete a Personal Development Plan, including quarterly reviews on your progress against the objectives you identify
- complete a learning log covering the period of your programme, updating this as you progress.

Key terms

Learning log – a written record of what you have learnt, how you put your learning into practice and reflections upon how it went and what you might change next time.

Personal Development Plan – a written document that is a record of the skill areas you need or want to develop (also known as goals) and how you are going to achieve them.

Role profile – the most important responsibilities, tasks, performance outcomes, competencies and challenges you will need to consider as part of a role.

Self-assessment – an appraisal of your own progress and development needs. This is an important part of making your Personal Development Plan.

Strengths and weaknesses – strengths are any relevant skills that you can perform well and can bring to your role. Weaknesses are areas where you need to improve or make changes to make a success of your role.



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Relation to the standards

In this task, you will be looking at how you need to develop over the course of your programme to deliver the best customer service you can. As part of this task you will be working towards demonstrating the following skills, knowledge or behaviours:

Knowledge:

By completing this task you should be able to:

- explain how the actions taken in the context of your job role and responsibilities impact on others in your organisation
- describe how to achieve your agreed targets and goals.

Skills:

By completing this task you should demonstrate personal organisation skills in organising your workload and prioritising tasks to meet deadlines. You should also be demonstrating that you can agree goals and deadlines, using tools and techniques to monitor your progress.

Behaviours:

By completing this task you should be able to show you can:

- conduct a self-assessment to identify your strengths and weaknesses in relation to your job role
- produce a Personal Development Plan to support the achievement of your agreed learning and development goals.

Distinction

As part of working towards **distinction** level, the Customer Service Practitioner standards require you to be able to:

- review the effectiveness of your Personal Development Plan and update it over the course of your programme.



Suitable evidence

Suitable evidence to support the achievement of these outcomes could include:

- SWOT analysis or similar
- Personal Development Plan (PDP)
- Continuous Professional Development (CPD) logs.



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Preparatory activities

1. Research what is meant by 'SMART' objectives. Explain each part of the acronym and what it means below:

S –

M –

A –

R –

T –

2. Research the types of headings that are often found on a Personal Development Plan. Make a list of the most frequently occurring headings and explain what they cover.

3. List the training resources available to you in your organisation.

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4. Research the types of thing that are normally included as part of a Learning Log. Make a list of the most frequently occurring areas and explain what they are.

5. Consider who can help you to identify your learning and development goals. Give **at least two** examples and explain what they can do to help.



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Knowledge application

List your job targets and goals:

Discuss with your employer how your targets and goals can be achieved.
Think about recording this conversation for evidencing and to refer to later.
Summarise the key points of your discussion below.

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Explain how you will recognise when your goals have been met.

Print a copy of your role profile to help with your Personal Development Plan. Consider keeping your role profile and your Personal Development Plan together. Use the profile to list your responsibilities in relation to your customer service role.



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Explain how the actions you perform as part of your role impact on others, both in your organisation and outside it. Give examples where possible.

Explain what the impact would be if you did not perform your work activities correctly.

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Sit with your manager or mentor and create your own Personal Development Plan to cover the period of your programme. Your organisation may have a template for this, but if not, we have provided a sample template here. You should list your agreed targets and goals and show how you plan to achieve them.

Personal Development Plan		What Timeframes will I work to?	How is it Relevant?	How will I Achieve it? (support/resources)	What Measures will tell me when I have achieved it?	Specific objectives (targets/goals)
		Set up a shadowing day this week . Write up what they do and the skills next week .	It will allow me to work out which skills I need to develop to go beyond my current role.	Reading a Customer Service Manager role profile. By job shadowing for a day.	I will be able to write a description of what they do and the necessary skills.	Gain insight into what a Customer Service Manager does and what skills are needed.

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Personal Development Plan	Specific objectives (targets/goals)	What Measures will tell me when I have achieved it?	How will I Achieve it? (support/resources)	How is it Relevant?	What Timeframes will I work to?

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Create and keep a Learning Log for the period of your programme. Your organisation may have a template for this but if not, we have provided a sample template here.

What happened?	What did you learn?	Learning date	How did/will you put this into practice?	What are your reflections?	Date practised
Emily showed me how to remain positive when talking to an angry customer on the phone.	I learnt not to take complaints personally and to speak politely to calm the customer down.	17th Jan	The next time I took a call from an angry customer I took a deep breath before speaking and thought about my words carefully.	It went quite well, but the customer took ages to calm down. Next time I will clarify the issue more quickly as Emily said that was why the customer stayed upset for so long.	18th Jan

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What happened?	What did you learn?	Learning date	How did/will you put this into practice?	What are your reflections?	Date practised

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Learner reflection

Complete the learner reflection detailing what you have learnt from carrying out the task, how you will make use of your learning in your work and which skills you still need to develop.

Learner reflection

Mentor/trainer/employer feedback

Learner signature:

Date:

Mentor/trainer/employer signature:

Date:

