

## TERMS OF REFERENCE

<b>NAME OF PROJECT</b>	:	Engagement of a service provider to design and conduct for PDIC the <b>"SEMINAR/WORKSHOP ON CUSTOMER SERVICE"</b>
<b>DURATION</b>	:	2 days (16 training hours)
<b>NUMBER OF RUNS</b>	:	1 batch
<b>SCHEDULE OF CONDUCT OF THE PROGRAM</b>	:	Q2 / Q3 of Yr 2022
<b>TARGET PARTICIPANTS</b>	:	PDIC Officers and Staff in various Job Levels, for a maximum of 30 participants
<b>LEARNING PLATFORM</b>	:	Online, via MS Teams
<b>ESTIMATED BUDGET</b>	:	P120,000.00, inclusive of all applicable taxes, to cover professional fees, one (1) master copy of the course materials, and post-program training evaluation report

### PROGRAM DESCRIPTION:

The program aims to develop/enhance the mindset and the capability of PDIC units/teams and their respective members to deliver quality customer service to both internal and external customers, from the initial engagement to final resolution of any customer service opportunity, in all aspects of the Corporation's operations.

### COMPETENCY GAPS TO BE ADDRESSED:

This program intends to provide developmental intervention to address proficiency gaps on:

**Service Orientation**, a core competency, defined as –

*"anticipating and responding quickly to the needs of customers, working with others to resolve issues and concerns, and implementing procedures that promote fast, reliable, trouble free and error free processing of transactions"*

and

**Customer Service and Support**, a technical/functional competency, defined as –

*"developing and delivering a range of services to address customer needs, issues and concerns at the least possible cost and time for the customer and PDIC."*

**PROGRAM OBJECTIVES:**

At the end of the program, the participants shall be able to:

- identify each unit/team's customers (ie., internal and external to the organization) and their needs/expectations;
- clarify the roles and responsibilities of the unit/team and each of its members in providing assistance to the needs/expectations of its customers;
- develop an awareness of one's roles (ie., as service provider and stakeholder), as well as one's strengths, vulnerabilities and thresholds; manage one's feelings and emotions;
- learn to provide the appropriate attention and response to customers' queries, requests, complaints and demands;
- apply customer service tools to make every interaction the best it can be;
- measure effectiveness in customer service delivery; and
- look forward to the prospects of changes in customer service and evolving customer expectations.

**PROGRAM CONTENT:**

- PDIC's Commitment to Public Service: The Corporate Statements
- Identification of Each Unit/Team's Customers and Their Respective Needs and Expectations;
- Roles and Responsibilities of the Unit/Team and Its Members to Address Customers' Needs and Expectations;
- Self-Awareness, Intrapersonal Relations and Self-Management:
  - Personal vis-à-vis Organizational Values;
  - Strengths, Vulnerabilities and Thresholds
  - Keeping One's Feelings and Emotions in Check
- Developing/Enhancing Positive/Effective Communication Skills
  - The Art of Asking Questions
  - Engaging in Active and Empathic Listening
  - Recognizing Verbal and Non-Verbal Cues
- Anticipating Customer Needs and Requirements
- Crucial Conversations
- Managing Various Types of Customers, Their Reactions and Behaviors
- Handling Difficult Customer Interfaces and Understanding Why They Occur in the First Place
- Preventing Complaints from Becoming Escalation Issues
- Reading Stressful Situations and Determining the Best Outcome
- Role Models and Winners in Customer Service
- Customer Service Toolkit and Checklist/s;
- Evaluating Customer Service Performance
- Customer Service Debrief
- Opportunity for Improvement - Changing Customer Service and Evolving Customer Expectations (ie., online self-service that's available and seamless across different channels, etc.)

**LEARNING MODES, being mindful to observe gender sensitivity and responsiveness:**

- Lectures and interactive discussions
- Online activity workshops
- Simulation Exercises
- Related Learning Checks

**DELIVERABLES OF THE SERVICE PROVIDER/RESOURCE PERSON/S:**

- Master Copy of the Course Material;
- Post-Training Assessment/Evaluation Report

**TRACK RECORD OF THE TRAINING PROVIDER:**

Established track record in the conduct of Seminar/Workshops on Customer Service and similar programs of no less than fifteen (15) years as stated in the list of Customer Service Courses and/or related training programs conducted and consulting services rendered.

**QUALIFICATIONS AND TECHNICAL EXPERTISE OF THE RESOURCE PERSON/S:**

- Significant experience of the Lead/Main Resource Person should be no less than fifteen (15) years in designing and/or conducting Customer Service courses / similar programs for government agencies, banking institutions or corporate organizations;
- If applicable, co-Resource Person/s' curriculum vitae shall likewise be submitted for evaluation; and
- Ability and willingness to customize the program to address specific and urgent training needs and requirements of PDIC and its primary mandates.

**CRITERIA FOR EVALUATION OF TRAINING PROPOSAL:**

The submitted proposal shall be evaluated based on the following criteria:

- Responsiveness to articulated needs
- Track record of training provider
- Qualifications / technical expertise of Resource Person/s
- Reasonableness of quoted fees and other costs

**DOCUMENTS FOR SUBMISSION AND OTHER REQUIREMENTS:**

- Training proposal with program investment;
- Profile of the Company, and Curriculum Vitae of the Lead/Main and Co-Resource Person/s (if any);
- Current/Valid DTI/SEC Registration;
- Current/Valid Mayor's/Business Permit;
- Documentary proof of registration with the Philippine Government Electronic Procurement System (PhilGEPS);

- Notarized Omnibus Sworn Statement;
- Notarized Authority of Signatory --- for Corporation, Secretary's Certificate; for Partnership/Joint Venture, Partnership's/Joint Venture's Certificate; for Sole Proprietorship, Special Power of Attorney, if signatory is not the owner of the business;
- Latest Income Tax Return received by the Bureau of Internal Revenue; and
- List of Customer Service Courses and similar training programs conducted for government agencies, banking institutions and/or corporate organizations, related consulting services rendered, as well as dates conducted/rendered

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