

**Contact Centres  
QCF Units of Assessment**

**Final NVQ Units**

**February 2011**

6 Graphite Square  
Vauxhall Walk  
London SE11 5EE  
info@skillscfa.org  
Tel: 020 7091 9620  
Fax: 020 7091 7340  
www.skillscfa.org

## CONTENTS

---

CC1 Improve personal effectiveness at work in a contact centre.....	1
CC2 Develop personal and organisational effectiveness in a contact centre.....	3
CC3 Improve organisational effectiveness and personal development in a contact centre .....	6
CC4 Comply with health and safety procedures in a contact centre .....	9
CC5 Monitor health and safety procedures in a contact centre.....	11
CC6 Manage health and safety procedures in a contact centre.....	14
CC7 Develop health and safety policy and procedures in a contact centre .....	16
CC8 Use specific features of contact centre systems and technology.....	19
CC9 Use systems and technology during customer contact in a contact centre.....	21
CC10 Support team use of contact centre systems and technology.....	23
CC11 Manage the use of contact centre systems and technology .....	26
CC12 Develop strategy for contact centre systems and technology .....	29
CC13 Contribute to customer service in a contact centre .....	31
CC14 Deliver customer service through a contact centre .....	33
CC15 Supervise customer service activities in a contact centre team .....	36
CC16 Manage customer service delivery in a contact centre .....	38
CC17 Develop customer service procedures for use in a contact centre.....	41
CC18 Contribute to sales activities in a contact centre .....	43
CC19 Carry out direct sales activities in a contact centre .....	45
CC20 Lead direct sales activities in a contact centre team.....	48
CC21 Manage direct sales activities in a contact centre .....	51
CC22 Manage direct sales operations in a contact centre .....	53
CC23 Communicate information to customers through a contact centre .....	56
CC24 Communicate information to customers in different but familiar contexts through a contact centre.....	58
CC25 Communicate information to customers through a contact centre .....	61
CC26 Coordinate customer communication processes in a contact centre .....	64
CC27 Contribute to performance management in a contact centre .....	66
CC28 Manage team and individual performance in contact centre operations .....	68
CC29 Develop and enhance performance management systems in a contact centre.....	70
CC30 Work with others to support customers in a contact centre.....	73
CC31 Provide support through a contact centre for specified products and/or services.....	75
CC32 Support customers and colleagues when providing contact centre services .....	77
CC33 Maintain customer support operations in a contact centre.....	80
CC34 Manage the provision of customer support through a contact centre.....	83
CC35 Contribute to resource plan development in contact centre operations .....	86
CC36 Manage resource planning and improvement of resource allocation in a contact centre.....	89
CC37 Coordinate resource planning strategy in a contact centre .....	92
CC38 Deal with incidents through a contact centre .....	94
CC39 Manage incidents referred to a contact centre.....	97
CC40 Manage incident management systems in a contact centre .....	99
CC41 Develop strategy for incident management by a contact centre .....	102

<b>Title</b>	Improve personal effectiveness at work in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC1	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to assess personal effectiveness in a contact centre	1.1 Identify strengths and areas for development in skills and knowledge against agreed criteria 1.2 Agree learning actions that address priority learning and personal development needs	
2 Be able to carry out development activities to improve personal effectiveness in a contact centre	2.1 Participate in programme of learning activities that supports personal development needs 2.2 Use feedback from participation in the agreed development activities to improve personal performance	
3 Be able to work with others in a contact centre team to improve personal performance	3.1 Identify how everyday work in a team leads to learning and personal development 3.2 Participate in team tasks that provide on-the-job learning opportunities 3.3 Use feedback on personal performance to plan further learning steps	
4 Understand how to improve personal effectiveness in a contact centre	4.1 Describe the organisational procedures and guidelines for contact centre tasks defined by their job role 4.2 Describe the range of products and/or services offered or supported by the contact centre 4.3 Describe the impact of legislation and/or regulations on their role within the contact centre 4.4 Explain the importance of using development activities that are relevant to identified business	

**QCF UNITS OF ASSESSMENT.**

	<p>needs</p> <p>4.5 Explain different sources of feedback to the personal development process</p> <p>4.6 Explain the importance of feedback to the personal development process</p> <p>4.7 Explain the importance of involving a person in authority in making a personal development plan</p>
--	--

**Additional Information about the unit**

Unit purpose and aim(s)	This unit concerns being able to assess personal effectiveness in a contact centre, carry out development activities to improve personal effectiveness, work with others in a contact centre team to improve personal performance and understand how to improve personal effectiveness in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	15

<b>Title</b>	Develop personal and organisational effectiveness in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC2	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to improve performance in a contact centre	1.1 Assess strengths and areas for personal development in the skills and knowledge needed to fulfil job role requirements 1.2 Prioritise areas for personal development against job role requirements 1.3 Identify development activities that are appropriate for improving identified areas for development 1.4 Use learning from development activities in the job role within the agreed timescale	
2 Be able to obtain feedback on work performance in a contact centre	2.1 Identify sources of feedback that will help develop personal and organisational effectiveness 2.2 Obtain feedback from different sources that are relevant to their job role	
3 Be able to use feedback to improve personal and organisational effectiveness in a contact centre	3.1 Agree with a person in authority the actions to be undertaken as a result of an analysis of the feedback 3.2 Agree a development plan with a person in authority which includes agreed objectives 3.3 Implement agreed actions in accordance with the development plan 3.4 Evaluate the effectiveness of the development plan against agreed objectives	

**QCF UNITS OF ASSESSMENT.**

<p>4 Understand the principles underpinning personal and organisational effectiveness in a contact centre</p>	<p>4.1 Explain the products and/or services offered or supported by the contact centre</p> <p>4.2 Explain the requirements of contact centre operational procedures and guidelines</p> <p>4.3 Explain the regulation and legislation that have an impact on contact centre operations</p> <p>4.4 Explain the importance of taking responsibility for personal development</p> <p>4.5 Describe self-assessment techniques for measuring personal strengths and weaknesses</p> <p>4.6 Explain the importance of prioritising actions to develop personal and organisational effectiveness</p> <p>4.7 Explain methods for analysing feedback about personal and organisational effectiveness</p>
---	---

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to improve performance in a contact centre, obtain feedback on work performance, use feedback to improve personal and organisational effectiveness and understand the principles underpinning personal and organisational effectiveness in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 2</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>

**QCF UNITS OF ASSESSMENT.**

Availability for use	Shared
Unit available from	
Unit guided learning hours	10

<b>Title</b>	Improve organisational effectiveness and personal development in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC3	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to prepare individual and team development plans in a contact centre	1.1 Assess individual and team personal development against identified business needs 1.2 Identify common themes from an analysis of individual and team development needs 1.3 Identify existing development activities that are commensurate with identified development needs 1.4 Identify options for other activities that would meet identified development needs 1.5 Evaluate the strengths and weaknesses of sources of information about development activities relevant to contact centre operations 1.6 Approve individual and team development plans that meet the requirement	
2 Be able to organise feedback collection to support personal development and organisational effectiveness in a contact centre	2.1 Organise opportunities for individuals and teams to obtain feedback without interruption to service 2.2 Enable individuals to have access to information about their personal development and organisational effectiveness needs 2.3 Identify opportunities for personal development and improvements in organisational effectiveness based on feedback 2.4 Confirm that feedback is current	



**QCF UNITS OF ASSESSMENT.**

	and relevant to the contact centre
3 Be able to promote and support actions to improve organisational effectiveness in contact centre operations	<p>3.1 Encourage suggestions for improvements in organisational effectiveness</p> <p>3.2 Make individuals aware of the procedures that will facilitate suggestions for improvements in contact centre operations</p> <p>3.3 Prioritise suggestions for improvements in contact centre operations</p> <p>3.4 Make recommendations for improvements in contact centre operations in accordance with organisational procedures</p>
4 Understand the principles underpinning personal development and organisational effectiveness in a contact centre	<p>4.1 Describe the products and/or services offered or supported by the contact centre</p> <p>4.2 Explain the requirements of contact centre operational procedures and guidelines</p> <p>4.3 Explain the regulation and legislation that have an impact on contact centre operations</p> <p>4.4 Explain the strengths and weaknesses of techniques to assess team and individual personal development needs</p> <p>4.5 Explain the importance of prioritising actions which encourage suggestions for improvements in contact centre operations</p>

**Additional Information about the unit**

Unit purpose and aim(s)	This unit concerns being able to prepare individual and team development plans in a contact centre, organise feedback collection to support personal development and organisational effectiveness, promote and support actions to improve organisational effectiveness and understand the principles underpinning personal development and organisational effectiveness in a contact centre
Unit expiry date	31 December 2013

**QCF UNITS OF ASSESSMENT.**

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 3
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	10

<b>Title</b>	Comply with health and safety procedures in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC4	
<b>WBA Unit No.</b>		
<b>Level</b>	1	
<b>Credit Value</b>	2	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to comply with organisational health and safety procedures in a contact centre	1.1 Identify the health and safety procedures relevant to the job role 1.2 Follow organisational health and safety procedures and techniques at all times 1.3 Follow the organisational and the manufacturer's instructions for the use of equipment and tools	
2 Be able to minimise health and safety risks relating to the job role in a contact centre	2.1 Identify the health and safety risks relevant to the job role 2.2 List the job role duties and responsibilities for minimising health and safety risks 2.3 Keep the work area clean and tidy in accordance with organisational requirements 2.4 Identify the actions to be taken if health and safety risks are not being minimised	
3 Understand the principles of health and safety in a contact centre	3.1 State how health and safety procedures affect their job role 3.2 Explain the purpose and use of safety-related equipment 3.3 Explain how to lift and handle heavy objects safely 3.4 Describe the health and safety hazards relevant to the job role 3.5 Describe common health and safety standards in the workplace including excessive noise, prolonged use of display screens and hazardous substances	

**QCF UNITS OF ASSESSMENT.**

	<p>3.6 Explain why it is important to keep the work area clean and tidy</p> <p>3.7 State the difference between hazard and risk in the work area</p>
--	--

**Additional Information about the unit**

Unit purpose and aim(s)	This unit concerns being able to comply with organisational health and safety procedures in a contact centre, minimise health and safety risks relating to the job role and understand the principles of health and safety in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 4
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	9

<b>Title</b>	Monitor health and safety procedures in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC5	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to assess health and safety risks in a contact centre	1.1 Identify the work areas that are subject to a risk assessment 1.2 Follow organisational procedures for assessing risk 1.3 Schedule health and safety risk assessments and audits 1.4 Establish the consequences of identified risks 1.5 Make recommendations for action that address the identified risks	
2 Be able to monitor compliance with health and safety procedures in a contact centre	2.1 Identify the health and safety procedures relevant to the job role 2.2 Use a compliance plan that addresses identified risks and is capable of identifying new risks 2.3 Carry out routine checks in accordance with the compliance plan 2.4 Communicate the findings of health and safety risk assessments and compliance monitoring to those who need to know	
3 Be able to provide guidance on health and safety matters in a contact centre	3.1 Identify the individuals who need information and advice on health and safety matters 3.2 Identify the requirements in health and safety procedures that are specific to contact centre job roles 3.3 Communicate information and advice on health and safety matters by the method that is appropriate for different contact centre job roles	

**QCF UNITS OF ASSESSMENT.**

<p>4 Understand the principles underpinning health and safety in their area of work in a contact centre</p>	<p>4.1 Explain the health and safety regulations and legislation that are relevant to their area of work in the contact centre</p> <p>4.2 Explain how to identify activities in the contact centre that require a risk assessment</p> <p>4.3 Explain organisational procedures for health and safety risk assessment in the contact centre</p> <p>4.4 Explain different options for action to mitigate health and safety risks in the contact centre</p> <p>4.5 Explain the advantages and disadvantages of different ways of communicating findings and recommendations on risk assessments</p> <p>4.6 Explain how the findings of health and safety risk assessments fit within general health and safety audits</p>
---	--

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to assess health and safety risks in a contact centre, monitor compliance with health and safety procedures, provide guidance on health and safety matters and understand the principles underpinning health and safety in their area of work in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 5</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>

**QCF UNITS OF ASSESSMENT.**

Unit available from	
Unit guided learning hours	20

<b>Title</b>	Manage health and safety procedures in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC6	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to review health and safety procedures in a contact centre	1.1 Establish the effectiveness of organisational procedures for health and safety 1.2 Identify options for improving health and safety procedures 1.3 Analyse the benefits and drawbacks of each option for the enhancement of health and safety procedures 1.4 Present recommendations for the enhancement of health and safety procedures by the agreed method	
2 Be able to implement actions to enhance health and safety procedures in a contact centre	2.1 Develop a plan that addresses areas identified for enhancement 2.2 Brief colleagues who are responsible for implementing the plan as to the likely effects on contact centre operations 2.3 Communicate the plan to everyone who may be affected 2.4 Meet the timescale of the implementation plan 2.5 Review the effectiveness of the implementation against its objectives 2.6 Make recommendations for adjustments to the plan and/or procedures following an analysis of the implementation	
3 Understand the principles underpinning health and safety in a contact centre	3.1 Explain organisational health and safety systems and procedures 3.2 Explain the importance of matching operational needs of a contact centre with health and safety	



	<p>requirements</p> <p>3.3 Evaluate the benefits and drawbacks of proposed actions to enhance health and safety procedures</p> <p>3.4 Justify what needs to be included in a plan to implement enhancements to health and safety</p> <p>3.5 Explain the importance of monitoring the effects of enhancements to health and safety procedures</p>
--	--

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to review health and safety procedures in a contact centre, implement actions to enhance health and safety procedures and understand the principles underpinning health and safety in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	20

<b>Title</b>	Develop health and safety policy and procedures in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC7	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	7	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to develop a strategy for health and safety in a contact centre	1.1 Define the strategic requirements for formal risk assessments, health and safety procedures and audits which comply with regulations and meet operational needs 1.2 Identify the business areas that must be served by health and safety procedures 1.3 Monitor the use of health and safety procedures for risk assessments and health and safety audits in accordance with the compliance plan 1.4 Identify the need for changes which meet contact centre business needs from an analysis of the results of health and safety compliance monitoring 1.5 Evaluate the benefits and drawbacks of changes to health and safety policy 1.6 Develop a strategy for health and safety in accordance with organisational requirements	
2 Be able to support the development of health and safety policy and procedures in contact centre operations	2.1 Develop health and safety policies and procedures that meet identified requirements, taking colleagues' views into account 2.2 Prepare a business case supporting the need for change or maintaining the status quo which is supported by evidence 2.3 Negotiate the adoption of those	

	changes that need to be made to health and safety policies procedures with minimum disruption to business
3 Understand the principles underpinning health and safety policy in contact centre operations	<p>3.1 Evaluate the impact of health and safety regulations and legislation relevant to contact centres</p> <p>3.2 Explain the basis for the design of organisational health and safety policies and procedures</p> <p>3.3 Explain the organisation's business aims and needs that may be affected by health and safety policies and procedures</p> <p>3.4 Explain the components of a health and safety audit</p> <p>3.5 Explain the characteristics of an effective audit</p> <p>3.6 Explain the importance of balancing health and safety requirements with contact centre business needs</p> <p>3.7 Explain the strengths and weaknesses of techniques for negotiating policy changes to health and safety</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to develop a strategy for health and safety in a contact centre, support the development of health and safety policy and procedures and understand the principles underpinning health and safety policy in contact centre operations
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 7
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law

**QCF UNITS OF ASSESSMENT.**

Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	20

<b>Title</b>	Use specific features of contact centre systems and technology	
<b>Skills CFA Unit Ref.</b>	CC8	
<b>WBA Unit No.</b>		
<b>Level</b>	1	
<b>Credit Value</b>	3	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to use contact centre systems and technology to carry out customer contact tasks	1.1 Log into the technology system that is appropriate for dealing with customer contacts 1.2 Follow defined pathways through the system to complete customer contact tasks 1.3 Use features of the technology contact handling system to control customer contacts 1.4 Locate information on the system needed to complete a customer contact 1.5 Identify to whom to refer when the customer contact cannot be completed 1.6 Input information into the system in accordance with organisational procedures 1.7 Validate the customer's identity from information given and information held on the system	
2 Understand contact centre systems and technology	2.1 State the organisational procedures and guidelines for handling customer contacts 2.2 List the products and/or services offered or supported by the contact centre 2.3 List the regulation and/or legislation relevant to the contact centre's work with customers 2.4 State to whom to pass contacts when they are outside the limits of their authority or the customer	

**QCF UNITS OF ASSESSMENT.**

	<p>contact is too difficult to handle</p> <p>2.5 State the procedures for logging onto the technology systems</p> <p>2.6 State how to respond to prompts from the system indicating the pathway to be followed</p> <p>2.7 State how to use systems and technology to handle customer contacts</p> <p>2.8 Identify the categories of customer contacts that they are authorised to handle</p>
--	--

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to use contact centre systems and technology to carry out customer contact tasks and understand contact centre systems and technology
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 8
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Use systems and technology during customer contact in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC9	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to use features of systems and technology to handle customer contacts in a contact centre	1.1 Handle contacts identified by the contact distribution system in accordance with organisational procedures 1.2 Access customer information through the system in accordance with organisational procedures 1.3 Adjust individual system settings to enable communication with customers through interactive functionality specific to the job role 1.4 Enhance customer service by making maximum use of the available functionality	
2 Be able to report on customer and contact handling information using pre-defined formats	2.1 Identify the customer and contact handling information needed for personal work planning and organisational reporting 2.2 Produce customer information and contact handling reports according to organisational guidelines and standards	
3 Understand the uses of contact centre systems and technology	3.1 Explain the benefits of different technology systems in terms of their ability to facilitate communication with customers 3.2 Describe the products and/or services offered or supported by the contact centre 3.3 Describe the organisational requirements and regulation or legislation that have an impact on the contact centre's operations	

**QCF UNITS OF ASSESSMENT.**

	<p>3.4 Describe the organisational procedures and guidelines for customer contact handling</p> <p>3.5 Describe the purpose of contact distribution systems and how the organisation's system works</p> <p>3.6 State the reasons for checking the sense of reports before issuing</p>
--	--

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to use features of systems and technology to handle customer contacts in a contact centre, report on customer and contact handling information using pre-defined formats and understand the uses of contact centre systems and technology
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 9
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	24



<b>Title</b>	Support team use of contact centre systems and technology	
<b>Skills CFA Unit Ref.</b>	CC10	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to provide guidance to colleagues on contact centre systems and technology	1.1 Provide advice and guidance in the use of technological functionality that enables optimum efficiency 1.0 Deliver coaching/buddying activities for colleagues in accordance with their development plans	
2 Be able to produce new reports in a contact centre	2.1 Identify contact metrics to be included in reports that are capable of contributing to organisational understanding of contact patterns 2.2 Produce new reports that meet the agreed requirements 2.3 Manipulate data according to organisational guidelines to make the most effective presentation of reports	
3 Be able to adjust system parameters to optimise performance in a contact centre	3.1 Predict the effects of alterations to applications and systems according to organisational policy and practices 3.2 Change routing rules to adjust contact priorities that meet resource availability and customer expectations 3.3 Identify data flow changes resulting from system updates 3.4 Evaluate the benefits and drawbacks of changes to different routing parameters 3.5 Manage predictive contact queuing efficiently	

<p>4 Be able to report on potential system enhancements in a contact centre</p>	<p>4.1 Identify areas where a system may benefit from modification</p> <p>4.2 Evaluate the potential benefits from system modifications against the resource cost of implementation</p> <p>4.3 Present findings and recommendations in accordance with organisational procedures</p>
<p>5 Understand the use of systems and technology to support contact centre operations</p>	<p>5.1 Describe the products and/or services offered or supported by the contact centre</p> <p>5.2 Explain the regulations or legislation that have an impact on contact centre operations</p> <p>5.3 Explain the organisational procedures and guidelines for contact centre operations</p> <p>5.4 Explain the organisational procedures and guidelines for the configuration of system parameters</p> <p>5.5 Explain the advantages and disadvantages of routing rule options</p> <p>5.6 Explain the importance of predictive contact queuing to manage contact distribution</p>

<p><b>Additional Information about the unit</b></p>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to provide guidance to colleagues on contact centre systems and technology, produce new reports, adjust system parameters to optimise performance, report on potential system enhancements and understand use of systems and technology to support contact centre operations</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 10</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or</p>	<p>Skills CFA</p>

**QCF UNITS OF ASSESSMENT.**

other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	20

<b>Title</b>	Manage the use of contact centre systems and technology	
<b>Skills CFA Unit Ref.</b>	CC11	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to manage the use of contact centre systems and technology operations	1.1 Use agreed performance metrics to monitor the efficiency of the systems 1.2 Monitor the production of routine and specialist reports according to organisational guidelines 1.3 Identify opportunities to enhance system performance from an analysis of monitoring reports and performance metrics 1.4 Identify options for enhancements to the system configuration that are capable of improving business performance 1.5 Implement configuration parameter changes in accordance with organisational procedures 1.6 Manage contacts efficiently by using predictive contact queuing rules according to organisational guidelines	
2 Be able to modify contact centre system parameters to optimise performance	2.1 Establish contact priorities by setting routing rules that meet customer expectations and organisational guidelines 2.2 Evaluate the benefits and drawbacks of different routing parameters against agreed criteria 2.3 Analyse the effects of alterations to applications and systems against agreed criteria	

<p>3 Be able to develop policy for continuity and ongoing development of contact centre systems</p>	<p>3.1 Develop operational continuity plans for systems in accordance with organisational processes and procedures and rules and regulations and the results of risk assessments for any proposed changes</p> <p>3.2 Gain agreement to the operational continuity policy and plans</p>
<p>4 Understand the management of contact centre systems and technology</p>	<p>4.1 Explain the service offer of the contact centre and the boundaries placed on that offer</p> <p>4.2 Explain the impact of regulation and legislation on contact centre operations, systems and technology</p> <p>4.3 Explain how to design performance metrics that are clear indicators of efficiency in contact centre operations</p> <p>4.4 Explain how to use the results of risk assessments of systems and technology</p>

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to manage the use of contact centre systems and technology operations, modify contact centre system parameters to optimise performance, develop policy for continuity and ongoing development of contact centre systems and understand management of contact centre systems and technology</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 11</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the</p>	<p>15. Business, Administration and Law</p>

**QCF UNITS OF ASSESSMENT.**

subject/sector classification system	
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	20

<b>Title</b>	Develop strategy for contact centre systems and technology	
<b>Skills CFA Unit Ref.</b>	CC12	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	7	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to develop strategy for contact centre systems and technology	1.1 Identify the aspects of business strategy that are influenced by systems and technology 1.2 Develop a strategy that meets current and anticipated requirements of contact centre systems 1.3 Ensure the strategy complements the contact centre's business strategy through consultation with colleagues	
2 Be able to develop organisational policy to ensure operational continuity for contact centre systems and technology	2.1 Identify the policy drivers that result from systems and technology strategy and operational requirements 2.2 Evaluate the risks associated with breaches of operational continuity resulting from systems or technology failure 2.3 Identify risk mitigation measures that are commensurate with the degree of risk 2.4 Develop organisational policy for systems in accordance with organisational standards 2.5 Secure commitment to the policy through consultation with colleagues	
3 Understand the strategic implications of contact centre systems and technology capability	3.1 Evaluate organisational procedures and guidelines and the structure of contact centre tasks that are affected by operational continuity issues and business strategy 3.2 Evaluate the impact of regulation	

**QCF UNITS OF ASSESSMENT.**

	<p>and legislation on the options for contact centre strategy and policy</p> <p>3.3 Explain the decision-making process in agreeing strategies and policies for systems and technologies</p> <p>3.4 Explain the advantages and disadvantages of different options for mitigating the risks associated with system failure</p> <p>3.5 Explain the strategic importance of linking the systems and technology and business strategy</p>
--	---

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to develop strategy for contact centre systems and technology, develop organisational policy to ensure operational continuity for contact centre systems and technology and understand the strategic implications of contact centre systems and technology capability
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 12
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12



<b>Title</b>	Contribute to customer service in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC13	
<b>WBA Unit No.</b>		
<b>Level</b>	1	
<b>Credit Value</b>	3	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to meet customer expectations in a contact centre	1.1 Greet customers in accordance with organisational guidelines 1.2 Provide requested information about products and/or services 1.3 Check the customer's understanding of the information provided 1.4 Close the customer contact in accordance with organisational guidelines	
2 Be able to meet organisational and regulatory requirements during customer contact	2.1 Deal with customers within organisational and regulatory restrictions 2.2 Explain to customers the limitations of the information that can be provided 2.3 Meet customer expectations of respect and politeness when delivering service within defined limits	
3 Be able to gather specified customer satisfaction information in a contact centre	3.1 Identify the customer satisfaction questions that should be asked 3.2 Ask customers specified questions about their level of satisfaction with service through the contact centre 3.3 Record responses to customer satisfaction in accordance with organisational guidelines	

<p>4 Understand the purpose of customer service in a contact centre</p>	<p>4.1 List the products and/or services offered or supported by the contact centre</p> <p>4.2 Explain how customer satisfaction can be influenced by behaviour toward the customer</p> <p>4.3 State the organisational requirements and regulation and/or legislation that place limits on the customer service that can be provided</p> <p>4.4 State to whom to refer dissatisfied customers</p>
---	--

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to meet customer expectations in a contact centre, meet organisational and regulatory requirements during customer contact, gather specified customer satisfaction information in a contact centre and understand the purpose of customer service in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 13</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>
<p>Unit available from</p>	
<p>Unit guided learning hours</p>	<p>5</p>

<b>Title</b>	Deliver customer service through a contact centre	
<b>Skills CFA Unit Ref.</b>	CC14	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to establish rapport with customers in a contact centre	1.1 Follow organisational guidelines for greeting and identifying customers 1.2 Explain the features and benefits of products and/or services to customers in accordance with organisational requirements 1.3 Provide the required information in response to customer requests 1.4 Check customers' understanding of the information provided 1.5 Identify options for the resolution of customers' queries that meet their needs 1.6 Close the customer contact in accordance with organisational guidelines	
2 Be able to support customer service delivery through a contact centre	2.1 Identify precisely customers' needs or requests 2.2 Check understanding of customers' needs by summarising their queries and requests 2.3 Keep records of customer queries or requests in accordance with organisational procedures 2.4 Use information collected from customers to enhance customer service delivery	
3 Be able to deliver customer service in a contact centre	3.1 Establish the limit of their authority for dealing with customers 3.2 Explain to customers when their enquiry must be referred to someone else because authority limits have been exceeded	

**QCF UNITS OF ASSESSMENT.**

	<p>3.3 Comply with regulatory requirements during customer contacts</p> <p>3.4 Explain the regulatory constraints to the customer when they affect customer service</p>
<p>4 Understand customer service in contact centres</p>	<p>4.1 Describe the limitations of the service offer that can be made to customers</p> <p>4.2 Describe the limits of authority in dealing with customers</p> <p>4.3 Explain the importance of checking customers' understanding of information provided</p> <p>4.4 Explain the importance of closing a customer contact in a professional way in accordance with organisational procedures and standards</p> <p>4.5 Describe the sources of information to be checked in order to update knowledge and understanding of organisational and regulatory requirements</p> <p>4.6 Explain the importance of understanding the customer's message</p> <p>4.7 Describe methods of adapting communication with customers to meet their expectations</p>

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to establish rapport with customers in a contact centre, support customer service delivery, deliver customer service and understand customer service in contact centres
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 14
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or	Skills CFA

**QCF UNITS OF ASSESSMENT.**

other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Supervise customer service activities in a contact centre team	
<b>Skills CFA Unit Ref.</b>	CC15	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to resolve difficulties in customer service in a contact centre	1.1 Resolve difficulties relating to customer identification and validation within the level of authority in accordance with organisational procedures 1.2 Resolve customer concerns referred from colleagues in accordance with organisational procedures 1.3 Provide advice to colleagues in customer service delivery in accordance with organisational procedures 1.4 Report customer issues that might impact on customer service delivery in accordance with organisational procedures	
2 Be able to monitor customer service performance and compliance with contact centre organisational and regulatory requirements	2.1 Identify customer issues that might impact on customer service delivery 2.2 Test the quality of customer service delivery through monitoring performance against agreed Key Performance Indicators (KPIs) 2.3 Validate monitoring data of customer service performance against other evidence 2.4 Identify areas for enhancement in customer service from an analysis of monitoring data 2.5 Inform colleagues of monitoring results in accordance with organisational procedures	
3 Understand customer service	3.1 Explain the features and benefits of	

**QCF UNITS OF ASSESSMENT.**

<p>activities in contact centres</p>	<p>the products and/or services offered or supported by the contact centre</p> <p>3.2 Explain organisational and regulatory requirements of customer service delivery in the contact centre</p> <p>3.3 Describe the organisation's customer service aims and objectives and the service offer of the contact centre</p> <p>3.4 Explain the importance of supporting colleagues by dealing with customer queries and issues that are outside their authority</p> <p>3.5 Explain how to design key performance indicators (KPIs)</p>
--------------------------------------	--

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to resolve difficulties in customer service in a contact centre, monitor customer service performance and compliance with contact centre organisational and regulatory requirements and understand customer service activities in contact centres
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 15
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	8

**QCF UNITS OF ASSESSMENT.**

<b>Title</b>	Manage customer service delivery in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC16	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to manage escalation processes for difficult customer service issues in a contact centre	1.1 Agree authority boundaries for staff at all levels who deal with customer issues or complaints 1.2 Resolve customer issues or complaints referred from colleagues (including high risk or high profile customers) in accordance with organisational procedures 1.3 Identify practicable ways of preventing recurrences of customer service issues	
2 Be able to manage the monitoring of customer service performance and feedback in a contact centre	2.1 Design Key Performance Indicators (KPIs) that are capable of measuring customer service performance 2.2 Gain approval to KPIs 2.3 Coordinate monitoring activities to test the quality of customer service against agreed KPIs 2.4 Analyse the results of monitoring data about customer service against organisational and regulatory requirements 2.5 Develop enhancements to monitoring procedures for customer service performance	
3 Be able to review organisational and regulatory requirements for customer service delivery in a contact centre	3.1 Evaluate the impact of existing organisational and regulatory requirements on customer service delivery in the contact centre 3.2 Recommend enhancements to organisational strategies and policies to meet regulatory requirements in customer service	



	<p>delivery</p> <p>3.3 Communicate changes in organisational customer service procedures that meet regulatory requirements</p>
<p>4 Understand the management of customer service in contact centres</p>	<p>4.1 Evaluate the implications for customer service of the organisation's products and/or services offered or supported by the contact centre</p> <p>4.2 Explain organisational and regulatory requirements of customer service delivery in the contact centre</p> <p>4.3 Evaluate the impact of the organisation's customer service aims and objectives on the service offer of the contact centre</p> <p>4.4 Explain how a customer or problem may become high risk or high profile</p> <p>4.5 Explain the importance of supporting team leaders and managers in reinforcing the escalation and complaints procedures</p>

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to manage escalation processes for difficult customer service issues in a contact centre, manage the monitoring of customer service performance and feedback, review organisational and regulatory requirements for customer service delivery and understand the management of customer service in contact centres
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 16
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or	Skills CFA

**QCF UNITS OF ASSESSMENT.**

other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	10

<b>Title</b>	Develop customer service procedures for use in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC17	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre	1.1 Assess the contribution of contact centre operations to the achievement of organisational business objectives 1.2 Develop the contact centre's service offer and its limits to meet organisational objectives 1.3 Use customer classification to define service standards in a contact centre that meet organisational objectives	
2 Be able to develop procedures for customer service through a contact centre	2.1 Produce design options for customer service procedures that are consistent with agreed requirements and budgets 2.2 Consult relevant people when developing different design options 2.3 Ensure the design options conform with legal requirements and with any organisational strategy and policy for customer service 2.4 Ensure design options take account of stakeholders' needs 2.5 Confirm the fitness for purpose of proposed procedures and guidelines following a trial	
3 Understand the development of customer service procedures in contact centres	3.1 Evaluate the impact of organisational and regulatory requirements on customer service delivery in the contact centre 3.2 Explain the link between the organisation's customer service aims and objectives and the service	

**QCF UNITS OF ASSESSMENT.**

	<p>offer(s) of the contact centre</p> <p>3.3 Explain how to define a service offer for a customer</p> <p>3.4 Explain how to trial draft customer service procedures and guidelines</p>
--	--

**Additional Information about the unit**

Unit purpose and aim(s)	This unit concerns being able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre, develop procedures for customer service and understand the development of customer service procedures in contact centres
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 17
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Contribute to sales activities in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC18	
<b>WBA Unit No.</b>		
<b>Level</b>	1	
<b>Credit Value</b>	3	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to gather and use specified sales information in a contact centre	1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures 1.2 Provide information to customers about products and/or services in accordance with organisational procedures 1.3 Collect from customers information that supports potential sales in accordance with organisational procedures 1.4 Check with customers the accuracy of the information provided 1.5 Keep records of customers in accordance with organisational procedures	
2 Be able to make direct sales to customers through a contact centre	2.1 Identify customers in accordance with organisational procedures 2.2 Establish customers' needs for potential sales of products and/or services within their level of authority 2.3 Check with customers the accuracy of the order 2.4 Refer customers to an authorised colleague when sales requests are beyond their level of authority 2.5 Complete the authorisation or payment in accordance with organisational procedures	

<p>3 Understand sales activities in a contact centre</p>	<p>3.1 List the products and/or services offered or supported by the contact centre</p> <p>3.2 List the regulations and/or legislation that has an impact on dealing with customers</p> <p>3.3 State the organisational procedures for processing sales and payments and/or establishing order authority with customers</p>
--	---

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to gather and use specified sales information in a contact centre, make direct sales to customers and understand sales activities in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 18</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>
<p>Unit available from</p>	
<p>Unit guided learning hours</p>	<p>6</p>

<b>Title</b>	Carry out direct sales activities in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC19	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to gather information needed for direct sales activities in a contact centre	1.1 Assemble information about products and/or services that support direct sales 1.2 Obtain from customers sufficient information to support direct sales activities 1.3 Create sales opportunities by making links between information provided by customers and products and/or services 1.4 Find potential new customers for products and/or services	
2 Be able to carry out direct sales to customers through a contact centre	2.1 Establish customers' identity in accordance with organisational procedures 2.2 Check customers' wishes and needs 2.3 Identify possible matches with products and/or services from information provided by customers 2.4 Explain to customers the features and benefits of products and/or services for sale 2.5 Adapt their sales approach and style to meet customer preferences 2.6 Maximise opportunities for cross-selling and up-selling 2.7 Complete the authorisation or payment in accordance with organisational procedures	

<p>3 Be able to keep direct sales records within a contact centre</p>	<p>3.1 Identify the information about customers, products and/or services that should be recorded during the sales process</p> <p>3.2 Record customer, product and/or service information in accordance with organisational procedures</p>
<p>4 Be able to comply with regulations and legislation during direct sales in a contact centre</p>	<p>4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre</p> <p>4.2 Ensure compliance with regulations during direct selling through a contact centre</p>
<p>5 Understand how to conduct sales activities in a contact centre</p>	<p>5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre</p> <p>5.2 Describe the organisational policies and procedures for direct sales through a contact centre</p> <p>5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities</p> <p>5.4 Describe the common objections and questions raised by customers during direct selling</p> <p>5.5 Explain how to identify cross-selling and up-selling opportunities</p> <p>5.6 Describe different methods of researching potential new customers</p> <p>5.7 Explain how to retrieve information from organisational sales records</p> <p>5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling</p>



Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 19
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	15

<b>Title</b>	Lead direct sales activities in a contact centre team	
<b>Skills CFA Unit Ref.</b>	CC20	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to carry out sales activities in a contact centre	1.1 Prepare for a direct sales activity in accordance with organisational procedures 1.2 Establish customer wishes and needs 1.3 Offer options to customers by linking their wishes and needs to products and/or services 1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour 1.5 Close the sale by agreement with the customer during the customer contact 1.6 Record the confirmed order in accordance with organisational procedures 1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre 1.8 Complete the authorisation or payment in accordance with organisational procedures	
2 Be able to analyse contact centre sales data	2.1 Collate sales data from direct sales activities in a format that enables data manipulation 2.2 Analyse sales performance against market and customer trends 2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan	
3 Be able to lead a team involved in	3.1 Identify sales activities which are	

**QCF UNITS OF ASSESSMENT.**

<p>direct sales activities in a contact centre</p>	<p>capable of fulfilling the sales plan</p> <p>3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling</p> <p>3.3 Monitor the team's sales performance against agreed targets</p> <p>3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach</p> <p>3.5 Provide encouragement and guidance to team colleagues during sales activities</p>
<p>4 Understand sales activities in a contact centre team</p>	<p>4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre</p> <p>4.2 Explain the organisational and regulatory requirements of direct sales activities</p> <p>4.3 Explain the techniques for overcoming objections and questions from customers during sales activities</p> <p>4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective</p> <p>4.5 Explain the importance of setting a good example in a contact centre team</p> <p>4.6 Explain how to set sales targets including cross-selling and up-selling</p>

**Additional Information about the unit**

<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to carry out sales activities in a contact centre, analyse contact centre sales data, lead a team involved in direct sales activities and understand sales activities in a contact centre team</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 20</p>
<p>Assessment requirements or guidance</p>	<p>Skills CFA Contact Centre Assessment</p>

**QCF UNITS OF ASSESSMENT.**

specified by a sector or regulatory body (if appropriate)	Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	8

<b>Title</b>	Manage direct sales activities in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC21	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to review the use of sales information and sales techniques in a contact centre	1.1 Organise spot checks of how sales information is gathered and sales techniques are used in accordance with organisational guidelines 1.2 Collate the results of sales monitoring processes to enable analysis 1.3 Identify possible enhancements to customer information collection and/or sales techniques	
2 Be able to develop plans for direct sales in a contact centre	2.1 Identify sales patterns and trends from an analysis of sales data 2.2 Identify areas for enhancement in sales activities from an analysis of sales data 2.3 Report the findings of the analysis to colleagues in the agreed format 2.4 Identify actions to be undertaken including allocating roles and responsibilities 2.5 Implement the agreed plans to enhance sales performance in accordance with organisational procedures	
3 Be able to develop individual and team sales performance in a contact centre	3.1 Identify collective skills needs for direct sales from an analysis of sales data 3.2 Identify team members' existing skills and knowledge from an analysis of sales data 3.3 Identify team members' development needs from an analysis of sales data	

**QCF UNITS OF ASSESSMENT.**

	<p>3.4 Agree personal and team development plans that are commensurate with the analysis</p> <p>3.5 Implement the agreed actions in accordance with the team and individual development plans</p>
4 Understand the management of sales activities in a contact centre	<p>4.1 Evaluate the impact of regulations and legislation on the management of sales activities through contact centres</p> <p>4.2 Evaluate the components of a sales plan against agreed criteria</p> <p>4.3 Explain how to create and implement team and individual development plans for sales skills in a contact centre</p>

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to review the use of sales information and sales techniques in a contact centre, develop plans for direct sales, develop individual and team sales performance and understand the management of sales activities in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 21
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Manage direct sales operations in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC22	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	7	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to contribute to the development of organisational sales strategy in a contact centre	1.1 Identify the features of organisational sales strategy that have an impact on direct sales operations 1.2 Recommend developments to the sales strategy that are capable of enhancing sales performance	
2 Be able to develop procedures and guidelines to be used for direct sales through a contact centre	2.1 Assess the importance of sales information that is needed to achieve the sales objectives 2.2 Confirm that the required sales information can be collected with minimum disruption to sales activities 2.3 Define the sales style and techniques to be used to achieve direct sales objectives 2.4 Confirm the fitness for purpose of the draft procedures and guidelines through a test and trial	
3 Be able to review sales planning, analysis and reporting techniques for direct sales through a contact centre	3.1 Review current sales plans and methods of devising them from an analysis of customer, market and sales information against agreed criteria 3.2 Identify the actions needed to achieve sales objectives and plans 3.3 Design sales analysis tools that are capable of monitoring sales and enhancing performance 3.4 Implement the agreed actions to enhance performance in accordance with the sales plan	

**QCF UNITS OF ASSESSMENT.**

	3.5 Define sales reporting requirements that are capable of capturing the required monitoring and sales performance information
4 Understand the principles underpinning direct sales activities in a contact centre	<p>4.1 Evaluate the strategic implications of the range of products and/or services covered by contact centre direct sales</p> <p>4.2 Evaluate current organisational approaches and systems for direct sales</p> <p>4.3 Evaluate the impact of regulation and legislation on direct sales operations</p> <p>4.4 Explain how to specify sales analysis requirements</p> <p>4.5 Evaluate the implications of the options for sales monitoring tools</p> <p>4.6 Evaluate how an organisational sales strategy drives direct sales operations</p>

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to contribute to the development of organisational sales strategy in a contact centre, develop procedures and guidelines to be used for direct sales, review sales planning, analysis and reporting techniques for direct sales and understand the principles underpinning direct sales activities in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 22
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA



**QCF UNITS OF ASSESSMENT.**

Availability for use	Shared
Unit available from	
Unit guided learning hours	30

<b>Title</b>	Communicate information to customers through a contact centre	
<b>Skills CFA Unit Ref.</b>	CC23	
<b>WBA Unit No.</b>		
<b>Level</b>	1	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to talk to customers on a familiar subject in a contact centre	1.1 Greet customers in accordance with organisational guidelines 1.2 Describe the products and/or services to customers in accordance with organisational guidelines 1.3 Speak to customers in a way that makes them feel confident about what is being said 1.4 Use positive language when describing products and/or services	
2 Be able to communicate in writing on a familiar subject in a contact centre	2.1 Complete written communications to customers in accordance with organisational guidelines 2.2 Present written communications with customers in formats that comply with organisational guidelines 2.3 Confirm that written communications are grammatically correct; spelled correctly and in house style before sending	
3 Understand how to communicate with customers in a contact centre	3.1 State the products and/or services offered or supported by the contact centre 3.2 List the organisational requirements and/or regulations about what can and cannot be expressed to customers verbally and/or in writing 3.3 State what information is best given to customers verbally and	

**QCF UNITS OF ASSESSMENT.**

	<p>what is best given in writing</p> <p>3.4 Explain the difference between positive and negative language when communicating with customers verbally and/or in writing</p> <p>3.5 Explain how to demonstrate “active listening”</p>
--	---

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to talk to customers on a familiar subject in a contact centre, communicate in writing on a familiar subject and understand how to communicate with customers in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 23
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	10

<b>Title</b>	Communicate information to customers in different but familiar contexts through a contact centre	
<b>Skills CFA Unit Ref.</b>	CC24	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to talk to customers on familiar subjects in a contact centre	1.1 Establish a rapport with customers in accordance with organisational guidelines 1.2 Describe products and/or services to customers in accordance with organisational guidelines 1.3 Provide the required information in response to customer questions about products and/or services 1.4 Vary the tone of voice to maintain customers' interest in products and/or services 1.5 Display "active listening" by replaying customers' comments back to them	
2 Be able to communicate in writing on familiar subjects in a contact centre	2.1 Identify when a customer contact would benefit from written communications 2.2 Produce written communications in accordance with organisational guidelines 2.3 Comply with recommended formats and layouts for written communications with customers 2.4 Ensure that written communications are concise and the meaning is clear 2.5 Ensure that written communications are accurate in content, spelling and grammar and conform with organisational guidelines before despatch	

<p>3 Understand the requirements of customer communication in a contact centre</p>	<p>3.1 Describe the products and/or services offered or supported by the contact centre</p> <p>3.2 Describe the organisational requirements and regulations about what can and cannot be expressed to customers verbally and/or in writing</p> <p>3.3 Explain what information is best given to customers verbally and what is best given in writing</p> <p>3.4 Explain how positive and negative language affects communications with customers verbally and/or in writing</p> <p>3.5 List the frequently asked questions from customers about products and/or services and responses to them</p> <p>3.6 Explain the importance of varying tone when talking to customers</p> <p>3.7 Explain the benefits and drawbacks of communicating with customers by telephone and in writing</p> <p>3.8 Explain the importance of reviewing and proof-reading before sending written communications to customers</p>
--	--

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to talk to customers on familiar subjects in a contact centre, communicate in writing on familiar subjects and understand the requirements of customer communication in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 24</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>

**QCF UNITS OF ASSESSMENT.**

Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Communicate information to customers through a contact centre	
<b>Skills CFA Unit Ref.</b>	CC25	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to communicate verbally with customers referred by others in a contact centre	1.1 Deal verbally with queries directly with customers and referred by others following organisational guidelines 1.2 Adapt the use of language to meet customers' understanding and needs 1.3 Ensure the needs of the organisation and customer are balanced in verbal communications with customers	
2 Be able to communicate in writing with customers referred by others in a contact centre	2.1 Deal with queries in writing directly with customers and referred by others following organisational guidelines 2.2 Adapt the use of language and written style to meet the customers' needs and understanding 2.3 Ensure the needs of the organisation and customer are balanced in written communications with customers	
3 Be able to support colleagues and monitor compliance with organisational communications guidelines in a contact centre	3.1 Monitor the effectiveness of communications between customers and colleagues against organisational guidelines and standards 3.2 Identify inadequacies in the standard of colleagues' verbal and/or written communications with customers 3.3 Provide feedback and guidance for	

**QCF UNITS OF ASSESSMENT.**

	improvement to colleagues on the standard of verbal and/or written communications
4 Understand the principles of communication with customers in a contact centre	<p>4.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre</p> <p>4.2 Describe the organisational requirements and regulations that have an impact on communication with customers</p> <p>4.3 Explain the organisational procedures and guidelines on written communication with customers</p> <p>4.4 Explain the benefits and drawbacks of choosing verbal or written communication with customers</p> <p>4.5 Describe the limits of authority of colleagues when dealing with the exchanges with customers</p> <p>4.6 Explain the strengths and weaknesses of formal and informal methods of monitoring communication between colleagues and customers</p> <p>4.7 Explain the techniques for providing colleagues with feedback and guidance on verbal and/or written communications with customers</p>

**Additional Information about the unit**

Unit purpose and aim(s)	This unit concerns being able to communicate verbally and in writing with customers referred by others in a contact centre, monitor compliance with organisational communications guidelines and understand the principles of communication with customers in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 25
Assessment requirements or guidance specified by a sector or regulatory body	Skills CFA Contact Centre Assessment Strategy



**QCF UNITS OF ASSESSMENT.**

(if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	8

<b>Title</b>	Coordinate customer communication processes in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC26	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to develop customer communication policies in a contact centre	1.1 Evaluate the costs and benefits of different media options for communicating with customers 1.2 Draft customer communication policies that fit organisational and customer service objectives 1.3 Gain management agreement to the customer communication policies	
2 Be able to support the development of customer service procedures and guidelines for use by front line colleagues in a contact centre	2.1 Ensure that customer service procedures and guidelines reflect customer service objectives 2.2 Evaluate the compliance of the draft procedures and guidelines with the customer communication policy 2.3 Reconcile customer communication policy with draft procedures and guidelines	
3 Be able to enhance customer service through effective customer communication in a contact centre	3.1 Identify teams' and individuals' areas for development in customer communication skills 3.2 Implement action to enhance team and individual communications skills that meet identified needs 3.3 Evaluate the effectiveness of skills development activities against communications policy objectives	

<p>4 Understand the principles of managing communication with customers in a contact centre</p>	<p>4.1 Evaluate the products and/or services offered by or supported by the contact centre</p> <p>4.2 Explain the impact of regulations and legislation on managing customer communication</p> <p>4.3 Evaluate the components of a customer communication policy</p> <p>4.4 Evaluate different methods for developing team and individual communications skills</p>
---	---

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to develop customer communication policies in a contact centre, support the development of customer service procedures and guidelines for use by front line colleagues in a contact centre, enhance customer service through effective customer communication and understand the principles of managing communication with customers in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 26</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>
<p>Unit available from</p>	
<p>Unit guided learning hours</p>	<p>12</p>

<b>Title</b>	Contribute to performance management in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC27	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to monitor individual and team performance in a contact centre	1.1 Agree with colleagues how performance will be monitored within the team to meet performance objectives 1.2 Carry out performance monitoring activities in accordance with organisational procedures 1.3 Identify shortfalls in performance against agreed objectives 1.4 Provide feedback to colleagues in a way that is motivating and identifies areas for improvement	
2 Be able to contribute to the enhancement of performance in a contact centre	2.1 Devise practicable strategies for managing the pressure of workflow in operational bottlenecks 2.2 Provide support in accordance with organisational performance needs	
3 Understand performance management in a contact centre	3.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre 3.2 Describe the effect of organisational procedures and guidelines on contact centre operations 3.3 Explain the impact of regulations and legislation on contact centre operations 3.4 Explain the importance of performance management for achieving efficiency in contact centre operations 4.5 Explain the importance of providing feedback that is both motivational	

**QCF UNITS OF ASSESSMENT.**

	and identifies actions for performance improvement
--	--

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to monitor individual and team performance in a contact centre, contribute to the enhancement of performance and understand performance management in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 27
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Manage team and individual performance in contact centre operations	
<b>Skills CFA Unit Ref.</b>	C28	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to organise performance-based feedback for contact centre colleagues	1.1 Identify a range of routes for obtaining feedback on performance in contact centre operations 1.2 Allocate responsibility for contact centre performance management in a way that makes optimum use of resources 1.3 Obtain usable feedback on performance from a range of sources	
2 Be able to organise team and individual performance improvement activities for contact centre colleagues	2.1 Identify opportunities for improvement from an analysis of feedback 2.2 Agree strategies for team building and the improvement of team and individual performance that are capable of meeting identified objectives 2.3 Monitor the progress of improvement activities and their effect against agreed objectives	
3 Be able to manage organisational change in contact centre operations	3.1 Develop procedures and guidelines that address the area(s) of operations that are subject to change 3.3 Organise a programme of buddying and coaching support that supports the organisational change 3.4 Obtain formal and informal feedback on work satisfaction and the reason for resignations 3.5 Provide practicable advice to management on the steps that can	

**QCF UNITS OF ASSESSMENT.**

	be taken to improve staff retention
4 Understand the management of performance in a contact centre	<p>4.1 Evaluate the impact of organisational procedures and guidelines for contact centre operations on team and individual performance</p> <p>4.2 Explain the importance of ensuring that performance management activities become part of day to day work and management</p> <p>4.3 Explain how staff turnover can be mitigated through management actions</p> <p>4.4 Explain the factors that influence staff retention</p>

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to organise performance-based feedback for contact centre colleagues, organise team and individual performance enhancement activities, manage organisational change and employee retention and understand the management of performance in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 28
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	15

<b>Title</b>	Develop and enhance performance management systems in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC29	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to develop a system for performance-based feedback in a contact centre	1.1 Evaluate methods of obtaining and sharing feedback on performance against agreed criteria 1.2 Develop practicable recommendations for improvements to the use of feedback on performance in the delivery of contact centre services 1.3 Ensure that the system is capable of delivering the agreed objectives	
2 Be able to develop and implement a performance management system in a contact centre	2.1 Evaluate features of existing performance management metrics and systems that deliver the required management information 2.2 Use feedback from colleagues to develop a performance management strategy that will meet agreed organisational strategies and objectives 2.3 Evaluate options for enhancements in performance management systems against agreed criteria 2.4 Implement the performance management strategy in accordance with the plan 2.5 Monitor the efficiency of the performance management strategy in delivering the organisational strategy and systems	



<p>3 Be able to direct the strategic plan for change management in contact centre operations</p>	<p>3.1 Establish the likely impact on operations of identified changes 3.2 Devise a change management plan that is capable of managing the strategy for change 3.3 Monitor changes in staff retention numbers and patterns 3.4 Identify practicable management options for improving work satisfaction</p>
<p>4 Understand strategies for the development and enhancement of performance management systems in a contact centre</p>	<p>4.1 Evaluate the impact of organisational procedures and regulation on contact centre operations, products and services 4.2 Evaluate the factors involved in developing, enhancing and implementing a performance management strategy for a contact centre against agreed criteria 4.3 Evaluate different methods of monitoring performance management systems and strategies against organisational strategy 4.4 Explain the strengths and weaknesses of techniques for managing contact centre teams operating under pressure</p>

<p><b>Additional Information about the unit</b></p>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to develop and implement a system for performance-based feedback in a contact centre, develop a performance management system, direct the strategic plan for change management and understand strategies for the enhancement of performance management systems in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 29</p>
<p>Assessment requirements or guidance</p>	<p>Skills CFA Contact Centre Assessment</p>

**QCF UNITS OF ASSESSMENT.**

specified by a sector or regulatory body (if appropriate)	Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	16

<b>Title</b>	Work with others to support customers in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC30	
<b>WBA Unit No.</b>		
<b>Level</b>	1	
<b>Credit Value</b>	3	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to establish and validate customers' identities in a contact centre	1.1 Use agreed greetings and openings for customer conversations 1.2 Link customers' identity with organisational records 1.3 Confirm customers' identity and authority in accordance with organisational procedures 1.4 Inform customers of what can or cannot be handled if their identity cannot be confirmed	
2 Be able to communicate information about specified products and/or services in a contact centre	2.1 Establish the products and/or services about which customers need information 2.2 Give customers a summarised introduction to requested products and/or services 2.3 Deal with customers within the agreed limits of what can be handled 2.4 Conclude a customer contact in accordance with organisational procedures	
3 Be able to hand over customer contacts to others in a contact centre	3.1 Refer customers elsewhere when they require information outside their limits of authority or knowledge 3.2 Explain to customers why and how they will be passed to someone else in accordance with organisational procedures 3.3 Provide as much information as possible about the customer contact prior to recording the	

**QCF UNITS OF ASSESSMENT.**

	contact
4 Understand how support for customers in a contact centre is provided	<p>4.1 List the products and/or services offered or supported by the contact centre</p> <p>4.2 List the regulations and/or legislation that has an impact on customers</p> <p>4.3 Explain how to use communication equipment for dealing with customer contacts</p> <p>4.4 State how and when to escalate a customer contact</p> <p>4.5 Describe the listening and questioning techniques to establish the information needed by customers</p>

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to establish and validate customers' identities in a contact centre, communicate information about specified products and/or services, hand over customer contacts to others and understand support for customers in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 30
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	10

<b>Title</b>	Provide support through a contact centre for specified products and/or services	
<b>Skills CFA Unit Ref.</b>	CC31	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to establish and validate customers' identity in a contact centre	1.1 Link customers' identities with correct organisational records 1.2 Confirm customers' identities and authorities in accordance with organisational procedures 1.3 Record any departure from the standard authorisation process in accordance with organisational procedures 1.4 Explain to customers the reasons for the authorisation procedures	
2 Be able to support customer needs for information and decisions about a range of products and/or services in a contact centre	2.1 Provide customers with the required information across a range of products and/or services 2.2 Use language and conversation in accordance with organisational guidelines 2.3 Make use of the features of communication equipment specified within the job role 2.4 Offer customers options for different requests about products and/or services that meet their requirements 2.5 Resolve customers' problems within their level of authority 2.6 Refer customers to someone with greater authority when customers' needs cannot be met within the limits of their authority 2.7 Comply with organisational procedures during customer contacts	

**QCF UNITS OF ASSESSMENT.**

<p>3 Understand how to support customers in a contact centre</p>	<p>3.1 Describe the features and uses of products and/or services with which they can deal</p> <p>3.2 Describe ways of maintaining and updating knowledge and understanding of products and/or services</p> <p>3.3 Explain the regulations and legislation that have an impact on contact with customers</p>
--	--

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to establish and validate customers' identity, support customer needs for information and decisions about a range of products and/or services and understand support for customers in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 31
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	18

<b>Title</b>	Support customers and colleagues when providing contact centre services	
<b>Skills CFA Unit Ref.</b>	CC32	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to communicate information about products and/or services to customers in a contact centre	1.1 Validate customers' identity in accordance with organisational procedures 1.2 Give customers an overview of products and/or services in accordance with organisational procedures for language and conversation 1.3 Resolve customers' problems and queries in a contact centre within their level of authority 1.4 Assist customers with decisions about products and/or services in accordance with organisational guidelines, relevant regulation or legislation 1.5 Refer customers to someone with greater authority when customers' requests or problems are beyond their level of authority 1.6 Record customer problems and complaints in accordance with organisational procedures	
2 Be able to monitor compliance with organisational requirements for customer contacts	2.1 Monitor compliance with organisational requirements for customer contacts against agreed criteria 2.2 Deal with breaches of organisational requirements in accordance with organisational procedures	

<p>3 Be able to provide advice and support to colleagues in a contact centre</p>	<p>3.1 Provide advice on matters relating to customers' identity, personal security and products and/or services that meets organisational standards and legislative or regulatory requirements</p> <p>3.2 Provide support that increases colleagues' understanding of organisational requirements and constraints on customer contacts that is commensurate with their needs</p>
<p>4 Understand how to support colleagues and customers in a contact centre</p>	<p>4.1 Explain the effect of organisational and regulatory requirements on supporting colleagues and customers</p> <p>4.2 Explain what constitutes non-compliance with legal and regulatory requirements and the implications of this</p> <p>4.3 Describe different sources of information about the organisation's products and/or services</p> <p>4.4 Explain how to update and maintain knowledge and understanding of products and/or services</p> <p>4.5 Explain the organisational systems for identifying customers and related personal security matters</p> <p>4.6 Explain how buddying and assisting colleagues with handling customer contacts increases understanding of organisational requirements</p>

<p><b>Additional Information about the unit</b></p>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to communicate information about products and/or services in a contact centre, monitor compliance with organisational requirements for customer contacts, provide advice and support to colleagues and understand how to support colleagues and customers in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>



**QCF UNITS OF ASSESSMENT.**

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 32
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	15

<b>Title</b>	Maintain customer support operations in a contact centre
<b>Skills CFA Unit Ref.</b>	CC33
<b>WBA Unit No.</b>	
<b>Level</b>	4
<b>Credit Value</b>	5
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:
1 Be able to review customer contact activities in a contact centre	1.1 Carry out spot checks of customer contacts in accordance with organisational guidelines 1.2 Carry out audits of working practices relating to customer contact activities in accordance with organisational guidelines 1.3 Take action to address areas identified as needing enhancement
2 Be able to deal with customer complaints about customer contacts and/or products and/or services	2.1 Establish the nature of complaints in accordance with organisational guidelines 2.2 Explain the advantages and disadvantages of identified options 2.3 Agree the optimum option with the customer that meets their needs 2.4 Record the closure of the complaint in accordance with organisational guidelines 2.5 Identify learning points from an analysis of complaints
3 Be able to ensure compliance with organisational and regulatory requirements in a contact centre	3.1 Confirm the organisational and regulatory requirements relating to customer contact activities 3.2 Establish the risks of non-compliance with requirements relating to customer contact activities 3.3 Take action to address activities identified as non-compliant

<p>4 Understand the management of customer support in a contact centre</p>	<p>4.1 Explain the organisational procedures and guidelines and regulations and legislation relevant to organisational customer contact activities</p> <p>4.2 Explain the plans for customer service audits</p> <p>4.3 Explain the impact of organisational aims on customer contact</p> <p>4.4 Analyse organisational customer complaints referral process</p> <p>4.5 Explain the importance of keeping comprehensive records of customer problems and complaints and how they have been resolved</p> <p>4.6 Analyse different techniques for identifying and evaluating options for dealing with customer problems and complaints</p>
--	---

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to review customer contact activities in a contact centre, deal with customer complaints about customer contacts and/or products and/or services, ensure compliance with organisational regulatory requirements and understand the management of customer support operations in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 33</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>

**QCF UNITS OF ASSESSMENT.**

Unit available from	
Unit guided learning hours	8

<b>Title</b>	Manage the provision of customer support through a contact centre	
<b>Skills CFA Unit Ref.</b>	CC34	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	5	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to link organisational strategy to customer systems and guidelines in a contact centre	1.1 Explain how strategic aims have an impact on customer support for products and/or services 1.2 Identify aspects of customer systems and guidelines that may benefit from a review	
2 Be able to review customer service provision in a contact centre	2.1 Analyse current performance through a comparison of actual performance against expectations set out in organisational systems and guidelines 2.2 Ensure the review covers customer identification and security, communication and dealing with problems and complaints, staff motivation and competence 2.3 Identify actions to enhance customer service that are commensurate with identified needs	
3 Be able to ensure compliance with organisational and regulatory requirements during customer contacts	3.1 Identify organisational and regulatory requirements that have an impact on customer contact activities 3.2 Establish the probability and consequences of non-compliance with organisational or regulatory requirements 3.3 Define checks that test compliance with organisational and regulatory requirements that are capable of meeting objectives 3.4 Implement compliance testing	

	<p>checks in accordance with the plan</p> <p>3.5 Take action to address shortfalls in compliance with customer contact activity requirements that are commensurate with identified needs</p>
<p>4 Understand the management of customer support operations in a contact centre</p>	<p>4.1 Evaluate the scope and effectiveness of organisational aims relevant to customer support</p> <p>4.2 Evaluate the impact of regulation and legislation on customer support</p> <p>4.3 Evaluate the efficiency of the process for reviewing and developing customer service systems and support</p> <p>4.4 Evaluate different methods of developing staff skills to ensure the delivery of effective customer support in a contact centre</p> <p>4.5 Explain the strengths and weaknesses of different risk assessment techniques applied to compliance risks in a contact centre</p> <p>4.6 Explain how to assess probability and consequences of risk</p> <p>4.7 Evaluate the effectiveness of different options to mitigate compliance risk</p> <p>4.8 Explain why systems and guidelines may benefit from a review of efficiency</p>

**Additional Information about the unit**

Unit purpose and aim(s)	This unit concerns being able to link organisational strategy and customer systems and guidelines in a contact centre, review customer service provision, ensure compliance with organisational and regulatory requirements during customer contacts and understand the management of customer support operations in a contact centre
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional	Contact Centre NOS 34

**QCF UNITS OF ASSESSMENT.**

standards or curricula (if appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	14

<b>Title</b>	Contribute to resource plan development in contact centre operations	
<b>Skills CFA Unit Ref.</b>	CC35	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	7	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to produce demand forecasts for contacts handled by contact centres	1.1 Identify the metrics that represent demand for contact centre services 1.2 Identify resource needs for contact centre staff from an analysis of demand 1.3 Predict demand for contact centre resources within agreed tolerances 1.4 Explain the reasons for anticipated changes in demand for contact centre resources	
2 Be able to carry out scheduling and staffing activities in a contact centre	2.1 Identify practicable options to address resource planning issues in consultation with colleagues 2.2 Brief colleagues on demand trends and forecasts, resource availability and their implications for meeting organisational objectives 2.3 Identify staff availability, preferences and constraints in context of business needs 2.4 Plan the deployment of staff to meet business needs and changing requirements	
3 Understand how to develop a resource plan for contact centre operations	3.1 Explain the impact of organisational requirement and regulation and legislation on contact centre operations 3.2 Explain the organisational procedures and guidelines relating to resourcing contact centre operations 3.3 Explain the importance of resource	



	<p>planning in the context of efficient contact centre operations</p> <p>3.4 Explain different techniques for monitoring and analysing resource needs in a contact centre</p> <p>3.5 Explain different techniques for predicting demand for contact centre resources</p> <p>3.6 Explain the importance of using confidence limits in demand forecasts in contact centres</p> <p>3.7 Explain how to use employee data and work records for resource planning purposes</p> <p>3.8 Explain the importance of considering staff availability, constraints and preferences when scheduling work</p> <p>3.9 Explain the importance of communication with colleagues about contact centre demand, resource availability and resource plans</p>
--	---

Additional Information about the unit	
Unit purpose and aim(s)	This unit concerns being able to produce demand forecasts for contacts handled by contact centres, carry out scheduling and staffing activities and understand how to develop a resource plan for contact centre operations
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 35
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	

**QCF UNITS OF ASSESSMENT.**

Unit guided learning hours	38
----------------------------	----

<b>Title</b>	Manage resource planning and improvement of resource allocation in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC36	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to develop organisational approaches to demand forecasting in a contact centre	1.1 Identify the organisational strategy and objectives that provide pointers to future demand 1.2 Assess the suitability of demand forecasting tools and the use of confidence limits for organisational objectives 1.3 Adapt demand forecasting methods to meet specified requirements	
2 Be able to allocate resources to meet demand in a contact centre	2.1 Identify the resources needed for contact centre operations from an analysis of demand 2.2 Identify the availability of suitable resources for deployment in contact centre operations 2.3 Allocate resources in a way that optimise efficiency within the constraints	
3 Be able to contribute to the development of resource policies in a contact centre	3.1 Identify the strengths and weaknesses of current organisational resource policies in terms of the ability to achieve organisational objectives 3.2 Confirm any need for any changes to organisational resource policies with colleagues 3.3 Recommend changes to organisational resource policies that would improve efficiency in contact centre operations	

<p>4 Understand the management of resource plans for contact centre operations</p>	<p>4.1 Analyse the impact of organisational requirement and regulation and legislation on contact centre operations</p> <p>4.2 Evaluate the impact of organisational procedures and guidelines relating to resourcing contact centre operations</p> <p>4.3 Explain the organisational strategies and objectives that may have an impact on resourcing contact centre operations</p> <p>4.4 Explain the uses of confidence limits in demand forecasting</p> <p>4.5 Explain the importance of reaching agreement with colleagues on the allocation of resources in contact centres</p> <p>4.6 Explain the influence of resource allocation on business efficiency</p>
--	---

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to develop organisational approaches to demand forecasting in a contact centre, allocate resources to meet demand, contribute to the development of resource policies and understand the management of resource plans for contact centre operations</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 36</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>

**QCF UNITS OF ASSESSMENT.**

Unit available from	
Unit guided learning hours	20

<b>Title</b>	Coordinate resource planning strategy in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC37	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to enhance contact centre strategy in terms of demand and resource implications	1.1 Evaluate the impact of business strategies on resourcing policies 1.2 Evaluate the effectiveness of demand forecasting tools in use against agreed criteria 1.3 Agree with colleagues the way in which resourcing policies, associated techniques and resourcing communication methods need to be enhanced 1.4 Implement any agreed changes in demand forecasting and resourcing communications in accordance with the plan	
2 Be able to define organisational policies for resource management for contact centre operations	2.1 Identify the extent to which resourcing, scheduling and staffing policies meet organisational strategy or objectives 2.2 Build colleagues' feedback into plans for enhancements to resource management strategies 2.3 Ensure that organisational resourcing, scheduling and staffing policies meet identified objectives	
3 Understand resource management strategies for contact centre operations	3.1 Evaluate the impact of regulation and legislation on contact centre operations and resourcing 3.2 Explain the importance of matching demand forecasts with organisational strategy 3.3 Explain the importance and role of colleagues in reviewing and updating resource planning and	

**QCF UNITS OF ASSESSMENT.**

	<p>management development</p> <p>3.4 Evaluate the strengths and weaknesses of techniques for communicating demand forecasts and resource plans to contact centre staff</p> <p>3.5 Explain the links between demand forecasting, resource planning and staffing requirements in a contact centre</p>
--	---

<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns being able to enhance contact centre strategy in terms of demand and resource implications, define organisational policies for resource management and understand resource management strategies for contact centre operations
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Contact Centre NOS 37
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	Skills CFA Contact Centre Assessment Strategy
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Deal with incidents through a contact centre	
<b>Skills CFA Unit Ref.</b>	CC38	
<b>WBA Unit No.</b>		
<b>Level</b>	2	
<b>Credit Value</b>	7	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to deal with incidents through a contact centre	1.1 Respond to incoming calls in a calm and professional manner 1.2 Maintain control of the conversation 1.3 Record the contact and information in an incident log in accordance with organisational procedures 1.4 Assess and prioritise reported incidents in accordance with organisational procedures 1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures 1.6 Provide information, advice and support in response to requests in accordance with organisational procedures 1.7 Escalate incident responses in accordance with organisational procedures	
2 Be able to use contact centre communications systems to deploy incident management resources	2.1 Communicate with external organisations in accordance with organisational procedures 2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident 2.3 Use agreed conventions of wording, style and approach appropriate for different communication media	



<p>3 Understand how to deal with incidents in a contact centre</p>	<p>3.1 Describe the incident management services offered by the contact centre</p> <p>3.2 Describe the impact of regulation or legislation on incident management</p> <p>3.3 Describe the purpose and use of decision trees</p> <p>3.4 Describe how to determine the appropriate allocation of resources to incidents</p> <p>3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response</p> <p>3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident</p> <p>3.7 Describe standard wording and codes used by the organisation when dealing with incident management</p> <p>3.8 Describe the type and extent of resources available for deployment in incident management</p>
--	--

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and understand how to deal with incidents in a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 38</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>

**QCF UNITS OF ASSESSMENT.**

Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	40

<b>Title</b>	Manage incidents referred to a contact centre	
<b>Skills CFA Unit Ref.</b>	CC39	
<b>WBA Unit No.</b>		
<b>Level</b>	3	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to manage incidents through a contact centre	1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures 1.2 Select resources that are available to deal with reported incidents 1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures 1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures 1.5 Monitor the management of the incident in accordance with organisational procedures 1.6 Ensure that the correct decision paths have been followed to manage reported incidents 1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures	
2 Be able to provide support to colleagues on incident management in a contact centre	2.1 Agree with colleagues the areas in which they need support and guidance in incident management 2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs 2.3 identify actions to improve team performance in incident handling from a review of incident management results	

**QCF UNITS OF ASSESSMENT.**

<p>3 Understand how to manage incidents reported to a contact centre</p>	<p>3.1 Explain the incident management services offered by the contact centre</p> <p>3.2 Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident</p> <p>3.3 Explain the importance of clear communication using the most appropriate channel with those dealing with incidents</p> <p>3.4 Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident</p> <p>3.5 Describe the strengths and weaknesses of different types of support for colleagues</p> <p>3.6 Explain the importance of reviewing incident management results</p>
--	--

**Additional Information about the unit**

<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to manage incidents through a contact centre, provide support to colleagues on incident management and understand management of incidents reported to a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 39</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>
<p>Unit available from</p>	
<p>Unit guided learning hours</p>	<p>30</p>

<b>Title</b>	Manage incident management systems in a contact centre	
<b>Skills CFA Unit Ref.</b>	CC40	
<b>WBA Unit No.</b>		
<b>Level</b>	4	
<b>Credit Value</b>	6	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to ensure the effective management of incidents through a contact centre	1.1 Ensure compliance with organisational procedures for handling reported incidents through an analysis of incident handling against agreed criteria 1.2 Use feedback to identify areas for enhancements to incident management systems 1.3 Identify metrics that measure changes in performance in incident handling 1.4 Use the findings of reviews to make recommendations for the enhancement of performance in accordance with organisational procedures 1.5 Implement agreed changes in accordance with organisational procedures	
2 Be able to contribute to the development of organisational strategy for incident management through a contact centre	2.1 Use an analysis of evidence to establish the need for changes in incident management handling 2.2 Develop recommendations for the ongoing review of organisational strategy for handling incidents in incident management 2.3 Ensure that the revised strategy meets organisational objectives	

<p>3 Understand the management of incidents reported to a contact centre</p>	<p>3.1 Explain the incident management services offered by the contact centre</p> <p>3.2 Evaluate the strengths and weaknesses of methods of monitoring contact handling which leads to incident management</p> <p>3.3 Evaluate the efficiency of techniques for analysing data and metrics relating to the handling of contacts which lead to incident management</p> <p>3.4 Evaluate methods of assessing the effectiveness of incident management against agreed criteria</p> <p>3.5 Explain the importance of defining the boundaries of procedures dealing with incident management and contact centre responsibilities</p> <p>3.6 Explain the importance of consultation with colleagues regarding possible changes in procedures</p> <p>3.7 Explain the organisational strategy relevant to incident management by the contact centre</p>
--	--

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to ensure the effective management of incidents through a contact centre, contribute to the development of organisational strategy for incident management and understand the management of incidents reported to a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 40</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>

**QCF UNITS OF ASSESSMENT.**

Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	
Unit guided learning hours	12

<b>Title</b>	Develop strategy for incident management by a contact centre	
<b>Skills CFA Unit Ref.</b>	CC41	
<b>WBA Unit No.</b>		
<b>Level</b>	5	
<b>Credit Value</b>	7	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Be able to develop organisational strategy for incident management through a contact centre	1.1 Establish the implications of linking incident management strategy and organisational strategy 1.2 Ensure the incident management strategy informs organisational policies and procedures 1.3 Communicate the requirements of the strategy to everyone who will be affected by it	
2 Be able to develop organisational procedures for incident management through a contact centre	2.1 Convert incident management strategic objectives into viable operational objectives and work flows 2.2 Use colleagues' feedback in the design of organisational procedures relating to incident management 2.3 Ensure incident management procedures include checks to ensure they are followed 2.4 Run a test prior to achieving agreement to ensure the fitness for purpose of the procedures 2.5 Monitor the effectiveness of the incident management procedures against agreed criteria 2.6 Use an analysis of monitoring data to make recommendations for the enhancement of incident management procedures	



<p>3 Understand the development of strategy for incident management through a contact centre</p>	<p>3.1 Define the strategic aims of the incident management service offered by the contact centre</p> <p>3.2 Evaluate the impact of regulation or legislation on incident management through a contact centre</p> <p>3.3 Evaluate the impact of the incident management strategy</p> <p>3.4 Evaluate techniques for defining the strategic aims of contact centre operations</p> <p>3.5 Explain the importance of consulting colleagues about the practicality of strategies that might be proposed</p> <p>3.6 Explain the importance of including checks in procedures to ensure that they are followed</p> <p>3.7 Evaluate the strengths and weaknesses of methods of testing procedures against agreed criteria</p>
--	--

<b>Additional Information about the unit</b>	
<p>Unit purpose and aim(s)</p>	<p>This unit concerns being able to develop organisational strategy for incident management through a contact centre, develop organisational procedures for incident management and understand the development of strategy for incident management through a contact centre</p>
<p>Unit expiry date</p>	<p>31 December 2013</p>
<p>Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)</p>	<p>Contact Centre NOS 41</p>
<p>Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Contact Centre Assessment Strategy</p>
<p>Support for the unit from an SSC or other appropriate body (if required)</p>	<p>Skills CFA</p>
<p>Location of the unit within the subject/sector classification system</p>	<p>15. Business, Administration and Law</p>
<p>Name of the organisation submitting the unit</p>	<p>Skills CFA</p>
<p>Availability for use</p>	<p>Shared</p>

**QCF UNITS OF ASSESSMENT.**

Unit available from	
Unit guided learning hours	12