



# **Pearson BTEC Level 2 Certificate in Contact Centre Operations**

## **Specification**

BTEC Specialist qualification

First teaching October 2011

Issue 2

## **Edexcel, BTEC and LCCI qualifications**

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at [qualifications.pearson.com](http://qualifications.pearson.com). Alternatively, you can get in touch with us using the details on our contact us page at [qualifications.pearson.com/contactus](http://qualifications.pearson.com/contactus)

## **About Pearson**

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: [qualifications.pearson.com](http://qualifications.pearson.com)

This qualification was previously known as:

Edexcel BTEC Level 2 Certificate in Contact Centre Operations (QCF)

The QN remains the same.

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*All information in this specification is correct at time of publication.*

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## Summary of Pearson BTEC Level 2 Certificate in Contact Centre Operations specification Issue 2 changes

Summary of changes made between previous Issue 1 and this current Issue 2	Page/section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	1
TQT value added	4
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	4
QCF references removed from unit titles and unit levels in all units	17-96
Guided learning definition updated	11

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html).



# BTEC Specialist qualification title covered by this specification

## **Pearson BTEC Level 2 Certificate in Contact Centre Operations**

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

The qualification and unit codes will appear on learners' final certification documentation.

The Qualification Number for the qualification in this publication is:

Pearson BTEC Level 2 Certificate in Contact Centre Operations 600/1637/1

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

This qualification is accredited by Ofqual as being part of Apprenticeships.

# Welcome to the Pearson BTEC Level 2 Certificate in Contact Centre Operations

## Focusing on the BTEC Level 2 Certificate in Contact Centre Operations

This qualification is designed to allow learners to develop their knowledge and understanding of working in a contact centre environment.

The Level 2 Certificate in Contact Centre Operations gives learners an introduction to the contact centre environment, and will give them the opportunity to develop essential knowledge such as covering personal responsibilities, the principles of health and safety, and improving personal effectiveness.

Learners have a choice of optional units covering more specialist areas such as systems and technology, incident handling, legal and regulatory requirements, sales and communication in a contact centre which will allow them to tailor the qualification to their own needs.

The BTEC Level 2 Certificate in Contact Centre Operations provides progression routes to related vocational qualifications such as the BTEC Level 3 Certificate in Contact Centre Operations and to employment in the sector.

## Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to easily fit into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

## Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

## Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSCs) to ensure that they meet employer and learner needs — in this case the Council for Administration. Many industry and professional bodies offer successful BTEC learners exemptions for their own accredited qualifications.

## **All you need to get started**

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Pearson vocational qualifications
- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence
- explanations of the content's relationship with the learning outcomes
- guidance on assessment, and what the learner must produce to achieve the unit.

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.





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# What are BTEC Level 2 Specialist qualifications?

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BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

## Sizes of Specialist qualifications

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For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

## **Pearson BTEC Level 2 Certificate in Contact Centre Operations**

The Pearson BTEC Level 2 Certificate covers some of the knowledge and understanding required for employment in a contact centre environment.

The Pearson BTEC Level 2 Certificate offers an engaging programme for those who are clear about the vocational area they want to learn more about. These learners may wish to extend their programme through the study of a related GCSE, a complementary NVQ or other related vocational or personal and social development qualification. These learning programmes can be developed to allow learners to study complementary qualifications without duplication of content.

For adult learners the Pearson BTEC Level 2 Certificate can extend their knowledge and understanding of work in a particular sector. It is a suitable qualification for those wishing to change career or move into a particular area of employment following a career break.

### **Key features of the Pearson BTEC Level 2 Certificate in Contact Centre Operations**

The Pearson BTEC Level 2 Certificate in Contact Centre Operations has been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised level 2 vocationally-related qualification
- progress to employment in a particular vocational sector
- progress to related general and/or vocational qualifications.

### **National Occupational Standards**

Where relevant, Pearson BTEC Level 2 qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Pearson BTEC Level 2 qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

Each unit in the specification identifies links to elements of the NOS in *Annexe C*.

The Pearson BTEC Level 2 Certificate in Contact Centre Operations relates to the CfA Contact Centre National Occupational Standards

# Rules of combination

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The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications have rules of combination.

## Rules of combination for the Pearson BTEC Level 2 qualifications

When combining units for the Pearson BTEC Level 2 Certificate in Contact Centre Operations, it is the centre's responsibility to ensure that the following rules of combination are adhered to:

### Pearson BTEC Level 2 Certificate in Contact Centre Operations

- 1 Qualification credit value: a minimum of 13 credits.
- 2 Minimum credit to be achieved at the level of the qualification: 10 credits.
- 3 All credits must be achieved from the units listed in this specification.

## Pearson BTEC Level 2 Certificate in Contact Centre Operations

The Pearson BTEC Level 2 Certificate in Contact Centre Operations is a 13-credit and 93 guided learning hour (GLH) qualification that consists of 3 mandatory units **plus** optional units that provide for a combined total of 13 credits. At least 10 credits must be at Level 2.

The Total Qualification Time (TQT) for this qualification is 130.

Pearson BTEC Level 2 Certificate in Contact Centre Operations			
Unit	Mandatory units	Credit	Level
201	Principles of Personal Effectiveness in a Contact Centre	2	2
202	Principles of Health and Safety in a Contact Centre	1	2
203	Principles of Personal Responsibilities and Working in a Business Environment	4	2
Unit	Optional units		
204*	Principles of Using Systems and Technology in a Contact Centre	3	2
205*	Principles of Communication and Customer Service in a Contact Centre	2	2
206*	Principles of Selling in a Contact Centre	2	2
207	Principles of Handling Incidents Through a Contact Centre	3	2
208	Principles Of Legal, Regulatory and Ethical Requirements of a Contact Centre	2	2
Unit	Optional Level 3 units		
304*	Principles and Processes of Systems and Technology in a Contact Centre	4	3
305*	Principles of Customer Service in a Contact Centre	4	3
306*	Principles of Sales Activities and Customer Support in a Contact Centre	4	3

\* The following units cannot be used in combination:

204 and 304

205 and 305

206 and 306



# Assessment

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All units within this qualification are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

To achieve a 'pass' a learner must have successfully passed all the assessment criteria.

## Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria and
- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues
- local, ie to reflect the employment context of the delivering centre
- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

## Qualification grade

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

In the Pearson BTEC Level 2 Specialist qualifications each unit has a credit value which specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit. This has been based on:

- one credit for those learning outcomes achievable in 10 hours of learning time
- learning time being defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria
- the credit value of the unit remaining constant regardless of the method of assessment used or the qualification to which it contributes.

## Quality assurance of centres

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Pearson BTEC Level 2 qualifications provide a flexible structure for learners enabling programmes of varying credits and combining different levels. For the purposes of quality assurance, all individual qualifications and units are considered as a whole.

Centres delivering the Pearson BTEC Level 2 qualification must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. Centre quality assurance and assessment is monitored and guaranteed by Pearson.

The Pearson quality assurance processes will involve:

- centre approval for those centres not already recognised as a centre for BTEC qualifications
- approval for the Pearson BTEC Level 2 qualifications and units
- compulsory Pearson-provided training and standardisation for internal verifiers and assessors leading to the accreditation of lead internal verifiers via the OSCA system
- quality review of the centre verification practice
- centre risk assessment by Pearson of overarching processes and quality standards
- remedial training and/or assessment sampling for centres identified through standardisation or risk assessment activities as having inadequate quality, assessment or internal verification processes.

## Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

## Quality Assurance Guidance

Details of quality assurance for the Pearson BTEC Level 2 qualifications are set out in centre guidance which is published on our website [qualifications.pearson.com](http://qualifications.pearson.com).

# Programme design and delivery

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## Mode of delivery

Pearson does not normally define the mode of delivery for Pearson BTEC Entry to level 3 qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

## Resources

Pearson BTEC level 2 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Pearson.

Where specific resources are required these have been indicated in individual units in the Essential resources sections.

## Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Pearson BTEC Level 2 qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

## Functional Skills

Pearson level 2 BTEC Specialist qualifications give learners opportunities to develop and apply functional skills. Functional Skills are, however, not required to be achieved as part of the BTEC Specialist qualification(s) rules of combination. Functional Skills are offered as stand alone qualifications.

# Access and recruitment

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Pearson's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

## Restrictions on learner entry

The Pearson BTEC level 2 Certificate in Contact Centre Operations is accredited on the for learners aged 14 and above.

In particular sectors the restrictions on learner entry might also relate to any physical or legal barriers, for example people working in health, care or education are likely to be subject to police checks.

## Access arrangements and special considerations

Pearson's policy on access arrangements and special considerations for BTEC and Pearson NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by Equality Act 2010 and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Pearson NVQ Qualifications*, which can be found on the Pearson website ([qualifications.pearson.com](http://qualifications.pearson.com)). This policy replaces the previous Pearson policy (Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

## Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

# Unit format

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Each unit has the following sections.

## Unit title

This is the formal title of the unit that will appear on the learner's certificate.

## Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

## Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

## Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

## Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

## Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

## Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

## Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

## Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

## Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

### Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

### Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- Learning outcome: this is shown in bold at the beginning of each section of content.
- Italicised sub-heading: it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading.
- Elements of content: the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element.
- Brackets contain amplification of content which must be covered in the delivery of the unit.
- 'eg' is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).



## Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content’s relationship to the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.
- *Essential resources* – identifies any specialist resources needed to allow learners to generate the evidence required for each unit. The centre will be asked to ensure that any requirements are in place when it seeks approval from Pearson to offer the qualification.
- *Indicative resource materials* – gives a list of learner resource material that benchmarks the level of study.



# Units

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Unit 201:	Principles of Personal Effectiveness in a Contact Centre	17
Unit 202:	Principles of Health and Safety in a Contact Centre	23
Unit 203:	Principles of Personal Responsibilities and Working in a Business Environment	29
Unit 204:	Principles of Using Systems and Technology in a Contact Centre	41
Unit 205:	Principles of Communication and Customer Service in a Contact Centre	47
Unit 206:	Principles of Selling in a Contact Centre	55
Unit 207:	Principles of Handling Incidents through a Contact Centre	63
Unit 208:	Principles of Legal, Regulatory and Ethical Requirements of a Contact Centre	69
Unit 304:	Principles and Processes of Systems and Technology in a Contact Centre	75
Unit 305:	Principles of Customer Service in a Contact Centre	81
Unit 306:	Principles of Sales Activities and Customer Support in a Contact Centre	89



# **Unit 201: Principles of Personal Effectiveness in a Contact Centre**

**Unit reference number:** T/503/0356

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 14

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## **Unit aim**

This unit concerns knowing the process for improving personal effectiveness in a contact centre and understanding the role of a team in improving personal effectiveness in a contact centre.

## **Unit introduction**

In a busy contact centre, personal development tends to result from on-the-job learning activities. In many contact centres you will be helped to develop and work with a personal development plan. You should also take some personal responsibility for your own development and take the initiative to use opportunities that arise to learn more about the job and the work involved.

Some learning activities are organised away from the job and clearly contribute to your skills and understanding. Others involve new experiences within your work and rely on feedback which helps you to understand what is expected of you in your role. Teamwork is also a vital part of learning for you and your colleagues.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know the process for improving personal effectiveness in a contact centre</p>	<p>1.1 List the expectations defined by the job role for working in a contact centre</p> <p>1.2 Describe the steps in identifying development needs and improving personal effectiveness</p> <p>1.3 Describe the steps in performance review processes</p> <p>1.4 Describe how personal development needs are affected by changes in products, services, business processes or legislative/regulatory developments</p> <p>1.5 Identify the types of learning resources available for improving personal effectiveness in the job role</p>
<p>2 Understand the role of a team in improving personal effectiveness in a contact centre</p>	<p>2.1 Describe the responsibilities of self, manager and team for developing personal effectiveness</p> <p>2.2 Explain how everyday work in a team leads to learning and personal development opportunities</p> <p>2.3 Describe the importance of feedback on performance to the learning process</p> <p>2.4 Explain the link between personal development and team effectiveness</p>

## Unit content

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### 1 **Know the process for improving personal effectiveness in a contact centre**

*Job role:* basic services and products offered or supported by contact centres; procedures and guidelines for basic contact centre tasks; approaches to brand and image

*Identifying development needs:* self-assessment; appraisal; verbal feedback from colleagues or customers; development plan; finding available off-the-job development activities; improving personal effectiveness, eg courses, job shadowing, on the job coaching, open learning, seminars, workshops

*Performance review processes:* steps eg establishing objectives, measuring performance against objectives, establishing areas for improvement, creating development plan

*Factors affecting personal development needs:* knowledge of products, services, business processes, legislative or regulatory developments; the importance of involving a colleague with authority when making personal development plans

*Resources for improving personal effectiveness:* learning resources, eg online materials, training courses, books and manuals

### 2 **Understand the role of a team in improving personal effectiveness in a contact centre**

*Responsibilities for developing personal effectiveness:* self; manager; team

*Learning and personal development opportunities:* on the job learning; working with other team members, eg developing good communication skills, negotiating and influencing skills, adaptability, dependability; self-motivation; positive attitude

*Feedback:* learning needs; identifying progress in personal development, eg customer surveys, service reports, appraisals by supervisors or managers, performance data

*Team:* role of teamwork in learning and personal development, eg learning from colleagues, team meetings; improving effectiveness, eg identifying and reporting working practices that could be improved; contributing to team activities.

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of personal effectiveness within contact centres. Learners need to know and understand:

- the processes involved in improving personal effectiveness
- the factors affecting personal developments needs
- the roles teams play in improving personal effectiveness
- the available learning and development opportunities.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the processes used to develop personal effectiveness within contact centres.

Developing knowledge of issues relating to personal effectiveness within a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing personal effectiveness, for example a supervisor or manager, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a supervisor or manager of a contact centre which deals with job roles of individuals and teams will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how and why the appraisal system is managed in their centre and how they use the centre's communication systems to feedback to relevant individuals. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, and of communicating effectively with all involved along with the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.



## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Bee, R and F – *Learning Needs Analysis and Evaluation* (Chartered Institute of Personnel and Development, 2003) ISBN 9780852929674

Calvert, N – *Gower Handbook of Call and Contact Centre Management* (Gower Publishing Ltd, 2004) ISBN 9780566085109

Wellington, P – *Effective People Management* (Kogan Press, 2011) ISBN 9780749462857

Wilson, J P – *The Call Centre Training Handbook: A Complete Guide to Learning and Development in Contact Centres* (Kogan Press, 2008) ISBN 9780749450885

Winstanley, D – *Personal Effectiveness* (Chartered Institute of Personnel and Development, 2005) ISBN 9781843980025

### Magazines

*Call Centre Focus*

*Call Centre Helper*

### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. The following may be useful:

[www.callcentre.co.uk](http://www.callcentre.co.uk) Call centre news and information

[www.cipd.co.uk](http://www.cipd.co.uk) The Chartered Institute of Personnel and Development

[www.contactcentreworld.com](http://www.contactcentreworld.com) Contact Centre World



# **Unit 202: Principles of Health and Safety in a Contact Centre**

**Unit reference number:** A/503/0360

**Level:** 2

**Credit value:** 1

**Guided learning hours:** 8

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## **Unit aim**

This unit concerns understanding health and safety procedures and how to minimise health and safety risks relating to the job role in a contact centre.

## **Unit introduction**

Work in a contact centre is subject to relevant health and safety regulation and legislation. The Health and Safety at Work Act sets out the general duties of employers and employees for protecting and promoting the health and safety of workers, customers and the public.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand health and safety procedures in a contact centre</p>	<p>1.1 Explain the procedures and techniques relating to health and safety</p> <p>1.2 Explain how health and safety legislation and/or regulation has an impact on job roles</p> <p>1.3 Explain the importance of adhering to the manufacturer’s instructions for the use of equipment and tools</p>
<p>2 Understand how to minimise health and safety risks relating to the job role in a contact centre</p>	<p>2.1 Explain the difference between a risk and a hazard in the workplace</p> <p>2.2 List the types of hazard relevant to a contact centre</p> <p>2.3 State the actions to be taken if hazards are identified</p> <p>2.4 Explain the importance of following health and safety procedures to minimise risk</p> <p>2.5 Describe the importance of adhering to standards for cleanliness, tidiness, noise and the use of hazardous substances in the workplace</p> <p>2.6 Describe the responsibilities of different roles for health, safety and the minimisation of risk</p>

## Unit content

### 1 Understand health and safety procedures in a contact centre

*Procedures and techniques:* organisational procedures; sources of information eg internal and external, health and safety officer, Health and Safety Executive (HSE); communication channels eg to report issues; computer use; equipment use; storing materials and disposing of waste materials; lifting and handling techniques; risk assessments, other audits eg procedures to follow in an emergency; training and updating

*Legislation and regulations:* relevant legislation and regulations eg Health and Safety at Work Act, Control of Substances Hazardous to Health Regulations (COSHH), Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR); Health and Safety (Display Screen Equipment) Regulations; Provision and Use of Work Equipment Regulations; Manual Handling Operations Regulations; sources of information and advice including how to seek clarification eg health and safety representatives, HSE, RoSPA; impact on own job role, others eg visitors, customers; organisational and individual legal responsibilities

*Use of equipment and tools:* instructions relevant to equipment and tools eg computers, display screen equipment; sources of information and advice; reasons to follow instructions eg reduce risk of injury, safe working environment; consequence of not following manufacturers' instructions

### 2 Understand how to minimise health and safety risks relating to the job role in a contact centre

*Differences between risk and hazard:* hazard eg drinks on the desk next to electrical items such as a PC; risk eg the chances of electrocution through the drink being spilled

*Types of hazard:* electrical hazard; hazardous substances; untidy work areas; prolonged use of display screens; incorrect use and storage of eg protective equipment, tools and equipment; lifting or handling heavy objects; excessive noise

*Actions to take:* relevant organisational procedures eg to minimise risk; raising awareness and reporting of hazard as appropriate eg colleagues, managers, in line with limits of own authority

*Importance of following health and safety procedures:* reduce risk of injury eg self, others, identify hazards; minimise risks; safe working environment; relevant legislation and regulations; sources of information and advice

*Importance of adhering to work standards* reduce risk of injury eg self, others, identify hazards; minimise risks; safe working environment; relevant legislation and regulations; sources of information and advice

*Responsibilities of different roles:* keep own work area clean and tidy; all employees to maintain a safe working environment and minimise risk; implementing and monitoring health and safety activities eg risk assessment, audits, reporting to external agencies; training and development; accountability

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops knowledge and understanding of the principles of health and safety within contact centres. Learners need to know and understand:

- organisational procedures relating to health and safety
- the importance of complying with these procedures, manufacturers' instruction and the relevant legislation and regulations
- how to identify hazards and minimise risk
- own and others' responsibility in maintaining a safe work environment.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of health and safety in the workplace.

Knowledge of issues relating to health and safety in a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others to comply with organisational and legal requirements in relation to health and safety, for example a health and safety representative, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a contact centre manager will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of the health and safety considerations in their centre and how all staff work to maintain a safe working environment. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational, manufacturer and legal requirements and the consequences of non-compliance.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. Other alternatives could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Duncan M, Cahill, F and Heighway, P – *Health and Safety at Work Essentials: The One-stop Guide for Anyone Responsible for Health and Safety Issues in the Workplace* (Lawpack Publishing Limited, 2006) ISBN 9781905261246

HSE – *Essentials of Health and Safety at Work* (HSE Books, 2006)  
ISBN 9780717661794

HSE – *Investigating Accidents and Incidents HSG 245* (HSE Books, 2004)  
ISBN 9780717628278

HSE – *Management of Health and Safety at Work L21* (HSE Books, 2000)  
ISBN 9780717624881

HSE – *Work with Display Screen Equipment: Health and Safety (Display Screen Equipment) Regulations 1992* (HSE Books, 2003) ISBN 978-0717625826

Pritchard J and Kemshall H (editors) – *Good Practice in Risk Assessment and Risk Management* (Jessica Kingsley, 1996) ISBN 9781853023385

### Leaflets

*Five steps to Risk Assessment* (HSE Publications)

*Health and Safety Law: What you should know* (HSE Publications)

### Magazines

*Call Centre Focus*

*Call Centre Helper*

**Websites**

Tutors may wish to develop a list of employer websites to support learning. Other websites address legislation and regulatory issues. The following may be useful:

<a href="http://www.britsafe.org">www.britsafe.org</a>	British Safety Council
<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.hsebooks.co.uk">www.hsebooks.co.uk</a>	Health and Safety Executive Books
<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	Health and Safety Executive
<a href="http://www.iosh.co.uk">www.iosh.co.uk</a>	Institution of Occupational Safety and Health
<a href="http://www.rospa.com">www.rospa.com</a>	Royal Society for the Prevention of Accidents



## Unit 203: Principles of Personal Responsibilities and Working in a Business Environment

**Unit reference number:** L/601/7638

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 32

### Unit aim

This unit is about understanding employment rights, health, safety and security, how to work with others and how to manage and improve own work in a business environment.

### Unit introduction

Every business organisation has a structure requiring administrative support to enable it to work efficiently and effectively. It is important for learners to understand the business environment in which they work, particularly in relation to organisational procedures. In this unit learners will examine the legal responsibilities of both the employer and employee in matters relating to health, safety and security of the work environment, maintaining the safety of equipment and working areas, and preventing risks to themselves and others. Learners will also explore the typical career structures open to those working in business and administration and their personal responsibilities at work.

All employees should have a good understanding of contracts of employment. In this unit learners will examine a contract of employment to develop their understanding of the various clauses usually contained within a contract, and will gain an awareness of employment legislation relating to equal opportunities issues of equality and diversity, and employee rights and responsibilities.

Understanding how to communicate and work with others are key roles for all administrators. It is important for learners to understand how good working relationships ensure an efficient workflow. They will investigate how to work with others and support colleagues, considering the sorts of behaviours necessary to do so effectively.

Learners will also consider the guidelines and procedures administrators follow and why these are important. They will be able to identify methods for planning own work, ways for improving own performance, and sources of help available to enable them sort out any problems that may arise at work. This unit will also enable learners to investigate different types of career pathways open to them.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know the employment rights and responsibilities of the employee and employer</p>	<p>1.1 Identify the main points of contracts of employment</p> <p>1.2 Identify the main points of legislation affecting employers and employees</p> <p>1.3 Identify where to find information on employment rights and responsibilities both internally and externally</p> <p>1.4 Describe how representative bodies can support the employee</p> <p>1.5 Identify employer and employee responsibilities for equality and diversity in a business environment</p> <p>1.6 Explain the benefits of making sure equality and diversity procedures are followed in a business environment</p>
<p>2 Understand the purpose of health, safety and security procedures in a business environment</p>	<p>2.1 Identify employer and employee responsibilities for health, safety and security in a business environment</p> <p>2.2 Explain the purpose of following health, safety and security procedures in a business environment</p> <p>2.3 Identify ways of maintaining a safe and secure environment in a business environment</p>
<p>3 Understand how to communicate effectively with others</p>	<p>3.1 Describe different methods of communication</p> <p>3.2 Explain how to choose the most appropriate method of communicating with others</p> <p>3.3 Describe ways of actively listening</p>

Learning outcomes	Assessment criteria
<p>4 Understand how to work with and support colleagues</p>	<p>4.1 Explain the purpose of agreeing standards for own work with others</p> <p>4.2 Explain the purpose of taking on new challenges and adapting to change</p> <p>4.3 Explain the purpose of treating others with honesty and consideration</p>
<p>5 Know how to plan own work and be accountable to others</p>	<p>5.1 Explain the purpose of meeting work standards and deadlines when completing tasks</p> <p>5.2 Identify ways of planning own work</p> <p>5.3 Compare ways of keeping other people informed about progress</p>
<p>6 Understand the purpose of improving own performance in a business environment and how to do so</p>	<p>6.1 Explain the purpose of continuously improving own performance in a business environment</p> <p>6.2 Describe ways of improving own performance in a business environment</p> <p>6.3 Identify different types of career pathways that are available</p>
<p>7 Understand the types of problems that may occur in a business environment and how to deal with them</p>	<p>7.1 Identify the types of problems that may occur in a business environment</p> <p>7.2 Explain ways of dealing with problems that may occur in a business environment</p> <p>7.3 Recognise how and when to refer problems to relevant colleagues</p>

## Unit content

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This content has been written in an expanded format to facilitate both a multiple choice test (MCQ) and portfolio assessment. Learners presenting work for portfolio assessment are not expected to evidence all of the bracketed content. Learners who opt for MCQ assessment could be tested on any part of this content.

### 1 **Know the employment rights and responsibilities of the employee and employer**

*Contract of employment:* main points (pay, working hours, holidays, sickness, notice period)

*Main points of legislation affecting employers:* equal opportunities, Sex Discrimination Act 1975/86, Race Relations Act 1976 (unlawful to discriminate directly or indirectly on the grounds of gender, marriage, race, colour, nationality, ethnic or national origins; this applies to a person who is an employee and to any person who is a job applicant); Equality Act 2010 (unlawful to discriminate against current or prospective employees who have a disability or who have had a disability in the past, employer has duty to make reasonable adjustments); Working Time Regulations 2007 (entitlement to paid annual leave); Equal Pay Act 1970 (work of 'equal value' must be paid at same rate for men and women); Employment Equality (Age) Regulations 2006 (default retirement age at 65 with statutory right for individuals to request postponement of retirement beyond age 65)

*Main legislation affecting employees:* rights to time off (annual leave, paternity/maternity leave, absences, sickness and statutory sickness pay, trade union or staff association representation); working hours; flexible working; minimum wage; redundancy; unfair dismissal; grievance procedure; exemptions (some exemptions exist for very specific situations); terms and conditions of their employment (written statement of key terms and conditions within two months of starting work, providing the contract is to last for more than one month); Employment Act 2002 (to help parents balance work and family commitments)

*Internal sources of information and support:* staff manual/hand book, Trade Unions, staff associations; sources of help (line manager, organisation's human resources staff, organisation's grievance procedures); main representative bodies (trade unions, staff associations)

*External sources of information and support:* ACAS, Business Link, Citizens Advice Bureau, The Work Foundation, BIS; sources of employment rights information (government websites, ACAS website, Citizens' Advice Bureaux)

*Role of employees' representative bodies:* to negotiate terms of employment; to protect interests of employees; to provide legal assistance and advice to employees; to combat bullying (offensive, intimidating, malicious or insulting behaviour, an abuse or misuse through means intended to undermine, humiliate, denigrate or injure recipient)

*Employer responsibilities for equality and diversity:* policies and procedures; role of the The Equality and Human Rights Commission (EHRC) (promotes equality and to tackle and eliminate discrimination in relation to gender, gender reassignment, religion, belief, disability, sexual orientation, age or race, and to promote human rights)

*Employee responsibilities for equality and diversity:* liability for causing offence; sensitivity to people's individual needs (observation, listening, checking particular requirements in advance (diet, mobility)); respect for others' abilities, background, values, customs and beliefs (open mindedness, learning about different cultures, avoiding assumptions over customs and beliefs, building working relationships through focusing on shared objectives)

*Benefits of equality and diversity procedures:* benefits to employees (improved staff morale, staff know they are being treated fairly) benefits to organisation; (range of perspectives, values and skills, valuable in teams to ensure decisions are viewed from a range of perspectives, to be representative of community, to create ideas, recruiting by ability/talent leading to increased profit, productivity, proficiency)

## 2 **Understand the purpose of health, safety and security procedures in a business environment**

*Employer responsibilities for health, safety and security at work:* to carry out risk assessments; provide protective equipment if needed and ensure emergency procedures are in place; employees need to be trained in health, safety and security procedures; plant and machinery must be safe and safe systems of work must be set and followed; articles and substances need to be moved, stored and used safely; adequate welfare facilities must be provided; health and safety policies and procedures produced; appropriate health, safety and security personnel appointed (health and safety representative who will represent employees' interests, report to employer regarding hazards, dangerous occurrences, general matters affecting groups of employees, role of fire wardens, first aiders); health and safety committee

*Employee responsibilities for health, safety and security at work:* to take care of own health and safety and of others who may be affected by own actions; to cooperate with others on health and safety; not to interfere with, or misuse, anything provided for own or others' health, safety or welfare; correctly use work items provided by the employer in accordance with training and instructions; health and safety in office environment (induction, use of equipment, display screen assessments, eye testing, filing cabinets, lifting, storage on shelves or on top of furniture, hazardous substances); reporting accidents and hazards; understanding limits of personal responsibility; following instructions; reporting accidents and hazards; cooperating with employer's measures

*Purpose of following health, and safety procedures:* to protect the health, safety and welfare of employees and customers; scope and responsibilities of own job role in dealing with health and safety; personal conduct; identifying health and safety hazards (faulty wiring, trailing flexes, torn carpet, broken glass, dangerous chemicals, visual display unit (VDU) screens, faulty equipment, poor posture when using computer, wet floors); reporting of accidents (RIDDOR); control of substances hazardous to health (COSHH) (sets out eight basic measures for employers and employees); regulations for using computers; keeping equipment clean and hygienic; following manufacturers' instructions; leaving equipment, resources and work area ready for the next user; positioning for copy typing; implications of non-compliance (exposing the organisation to fines or prosecution, exposing customers and colleagues to accidents)

*Purpose of following security procedures:* types of confidential information (customer or employee records); breach of confidentiality eg overheard conversations; Data Protection Act 1998 (eight principles to protect the privacy of individual people, rules as to the personal data that can be collected and what use may be made of this information); Freedom of Information Act 2000 (gives individuals rights to access information held by public bodies, such as local authorities, central government, the NHS, schools and police); data protection infringement; intruders; not establishing caller's identity; mislaid files; easy access to computers

*Ways of maintaining a safe and secure environment:* importance of having procedures in place; visitors' book; ID badges; computer passwords; dealing with sensitive or confidential information; when to refuse access to information; file management; establishing caller's identity; keypads; locked filing cabinets; limited keyholders; closed circuit television (CCTV); complying with the law (Data Protection Act 1988, Copyright, Designs and Patents Act 1988, Computer Misuse Act 1990)

### 3 Understand how to communicate effectively with others

*Verbal methods of communication:* focusing on what others are communicating; questioning when unsure; adapting communication to meet the needs of others; making positive contributions to discussions; acknowledging others' views; showing confidence when communicating; methods (making and receiving telephone calls, contributing to discussions, participating in meetings)

*Non-verbal communication:* body language (facial expressions, eye contact, gestures, posture, spacing, touch); impact on others (can have greater impact than speech)

*Written communication:* types (letters, memos, reports, email); importance of presenting positive image of self and organisation (using clear, professional language, correct spelling and grammar)

*Using most appropriate method:* identifying most appropriate method of communicating to meet the needs of other people (emails, meetings, formal and informal, memos, letters, website entries, adaptations, reminders, briefing of information); choice of method; level of detail; use of jargon; choice of language; use of graphics; importance of adapting methods of communicating to meet different needs (to make communication more effective, to make people feel valued, to enhance working relationships)

*Active listening:* active listening (empathising, analysing, synthesising), verbal techniques (clarifying understanding by paraphrasing, asking more questions to get more information, repeating key words, making encouraging noises like Oh, Ah, OK, and Hmm, reflecting back to check understanding); non-verbal techniques (using body language such as gestures, leaning forward, good eye contact, using facial expressions, keeping an open posture); barriers to listening (dreaming, filtering, pre-judging, rehearsing, advising); importance of confidentiality of information given; reasons for asking questions if not sure (to avoid mistakes that could be expensive to put right or that could have a negative impact on reputation of the organisation)

#### 4 **Understand how to work with and support colleagues**

*Purpose of agreeing standards for own work with others:* sharing work goals and plans; clarifying instructions and work requirements; seeking support when required; asking appropriate questions to secure information; understanding and following instructions (when making/receiving telephone calls or sending/receiving emails); understanding limits of own responsibility (when updating database files)

*Purpose of taking on new challenges and adapting to change:* important to aid organisation's continuous improvement; enhance organisation's competitive position; to build own skills; job security

*Purpose of treating others with honesty and consideration:* openness about mistakes and own performance; adherence to rules in handling valuables; prompt notification if mistakes made in own favour (overpaid salary, honesty over reasons for time away from work, admittance of areas of ignorance); better work atmosphere; to make job easier (by admitting own ignorance and asking for help); more likely to receive consideration from others if treating them with consideration; maintaining team objectives and flow of work

#### 5 **Know how to plan own work and be accountable to others**

*Purpose of meeting work standards and deadlines:* importance (to be reliable, to build trust, to reduce stress, to reduce need for supervision, to enhance efficiency); high standards (accuracy, presentation, meeting deadlines); importance (building colleagues' confidence in work, less time spent on supervision and checking, building own confidence, enhancing organisation's reputation); maintaining team work, motivation and objectives

*Planning own work:* methods (task list, work schedule, diary systems, prioritising, monitoring work, checking against deadlines, checking for accuracy and quantity); importance of quality measures (to be agreed amongst colleagues to create consistent standards across team, to motivate team members); examining other commitments shown on task list, work schedules; allowing for contingencies; need to follow regulations

*Keeping others informed of progress:* using techniques and tools (diaries, planners, 'to do lists', catch-up meetings, conference calls, emails); how to plan and allocate time; meeting deadlines; ways of informing others of progress; revising plans; when to use different ways of informing others

## 6 **Understand the purpose of improving own performance in a business environment and how to do so**

*Improving own performance at work:* importance (to develop own skills, to gain personal satisfaction, to enhance organisation's competitive position)

*Ways of improving own performance:* carrying out a skills audit; identifying strengths and weaknesses; importance of using feedback (to learn, to continuously improve own work, to understand own impact on others); methods of feedback (formal, informal, appraisal, review, personal development planning); learning activities (on the job – work shadowing, coaching, mentoring, job rotation; off the job – college, distance learning, elearning); independent learning; learning styles; importance of developing learning plans (to set objectives to meet personal and professional goals, identify resources and support needed, set review dates, monitor plan to assess progress against targets); finding advice and information on career development inside the organisation (human resources departments, training courses); outside the organisation (libraries, community centres, newspapers, the internet); continually monitoring and improving work; setting high standards; taking on new challenges; learning from others

*Career pathways:* typical career pathways (team administration, departmental administrator, administration manager, secretary, personal assistant); specialisms (customer service, accounting, marketing, human resource management, purchasing, information technology support)

## 7 **Understand the types of problems that may occur in a business environment and how to deal with them**

*Problems:* types (equipment failure, loss of data, unable to meet deadlines and commitments, distractions, uncertain which procedure to follow, uncertain what procedure means); staffing (shortages, training, overstaffing)

*Dealing with problems:* defining boundaries and roles; asking for clarification; using time management techniques; problem solving skills (defining problem, generating alternatives, decision making, evaluating the decision); having a contingency plan

*Referring problems:* reporting to relevant colleagues (line manager or person delegated to provide guidance and support, technical support facility); following organisation's policies and procedures; when to refer problems (if outside own authority, when unsure, to line manager)



## Essential guidance for tutors

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### Assessment

This unit can be assessed internally through a portfolio of evidence, or it can be assessed externally through an onscreen multiple-choice test. The following information on assessment relates to assessment by portfolio. Pearson publishes separate guidance and information on MCQ testing.

### Guidance for portfolio assessment

If assessed through a portfolio of evidence, learners need to provide evidence of an investigation into a specific administrative job role (learners could investigate their own if employed). It is suggested that learners do not reproduce large chunks of information verbatim from company handbooks or legislation, but contextualise it to a job they are familiar with or have investigated.

For learning outcome 1 learners should not just simply list different legislation, procedures and representative bodies, but instead they should relate this to a specific organisation to put this in context.

Learning outcome 2 could be assessed by asking learners to relate health, safety and security procedures to a specific business environment, probably the same organisation used in outcome One, using the company's policies and procedures.

For learning outcomes 3 to 7, learners could draw on their own experiences of working with others and planning their work either as employees or from work placements. Alternatively, they could interview people working in suitable administrative roles, especially in relation to procedures for dealing with problems.

For all the assessment criteria the work could be done in writing or, alternatively, the evidence could be collected orally with learners explaining the reasons and processes to the assessor. It may be possible to assess the unit through professional discussion, with a signed witness statement. Evidence may be based on scenarios such as staff induction or staff training.

If this method is used then the assessor should ensure the signed statement includes sufficient detail to support the assessment decisions for all criteria assessed in this way.

The minimum requirements that learners must include in their portfolio of evidence are as follows:

To meet criterion 1.1, learners should use a contract of employment from a specific administrative job role and identify four main points.

For criterion 1.2, learners must know the main legislation affecting employers and employees, and whilst learners are not expected to just recall dates of legislation, it is important they can identify the detail of three main acts of legislation affecting employers and one piece of legislation which affects employees. Learners should relate this to a specific job role in an organisation.

To achieve criterion 1.3, learners should be able to identify a range of sources of information and support on employment rights and responsibilities. They must identify at least two internal and two external sources of information.

For criterion 1.4 learners must describe what is meant by representative bodies, using examples from the organisation they are researching, and then fully describe at least one way these bodies can help the employee.

To achieve criterion 1.5, learners need to identify employer and employee responsibilities for diversity and equality in the workplace, giving at least two employer responsibilities and two employee responsibilities.

For criterion 1.6, learners should draw on the equality and diversity procedures at a specific organisation and explain the benefits of these being followed, giving one benefit for the employer, one benefit for the organisation, and one benefit for the employee.

To achieve criterion 2.1, learners do not need to reproduce large chunks of health, safety and security information verbatim from company handbooks, but they should relate their research to a specific business and identify at least two employer responsibilities and two employee responsibilities.

For criterion 2.2 learners should fully explain one purpose of following health and safety procedures, and one purpose of following security procedures.

To achieve criterion 2.3 learners must identify three ways of maintaining a safe and secure environment.

To achieve criterion 3.1, learners must describe what is meant by effective communication with others including two verbal communication methods, two non-verbal communication methods, and two written communication methods.

For criterion 3.2 learners should explain at least two ways of choosing the most appropriate methods of communication to meet other people's communication needs.

To achieve criterion 3.3, learners must describe ways of active listening to show they can understand barriers to listening, and give four different techniques which demonstrate active listening.

To achieve criterion 4.1, learners should explain at least two reasons for the purpose of agreeing standards for own work, particularly in relation to knowing limits of own responsibility.

For criterion 4.2, learners should explain two reasons for taking on new challenges and adapting to change.

For criterion 4.3, learners should explain the purpose of treating others with honesty and consideration, giving at least two detailed reasons which go on to demonstrate an understanding of the implications of the relationship with others when not being honest.

To achieve criterion 5.1, learners must explain the purpose of meeting work standards, giving at least two fully explained reasons for meeting standards and deadlines when completing tasks.

For criterion 5.2, learners must identify at least two methods for planning own work.

For criterion 5.3, learners must compare different ways of keeping others informed of progress, comparing the benefits and limitations of at least two different ways.

To achieve criterion 6.1, learners must explain the purpose of continuously improving own performance at work, expanding on at least one reason.

For criterion 6.2, learners must describe at least three ways of improving performance. This should include ways both inside and outside the organisation.

For criterion 6.3, learners must identify at least three career pathways in the business and administration environment which interest them. They can get details of specific job roles to support their evidence.

To achieve criterion 7.1, learners must identify different types of problems which can occur in a business environment, relating at least two examples of problems to the administrative function.

For criterion 7.2, learners must explain at least two ways of dealing with problems. These can relate to the problems identified in 7.1 or other problems they are aware of.

To achieve criterion 7.3, learners need to know their limits of responsibility and give one reason explaining when they should refer problems to others in a particular work situation, and how they should do this.

### Indicative resource materials

#### Textbooks

Ashley V and Ashley S – *Business and Administration: To Support all Level 2 Vocational Qualifications in Business and Administration: Student Handbook Level 2* (Council for Administration, 2007) ISBN 9780955092046

Carysforth C, Nield M and Richards, C – *BTEC Level 2 First Business Student Book* (Pearson, 2010) ISBN 9781846906206

Carysforth C – *NVQ Level 2 Business and Administration* (Heinemann, 2006) ISBN 978043546335

#### Websites

<a href="http://www.acas.org.uk">www.acas.org.uk</a>	The Advisory, Conciliation and Arbitration Service, a government funded agency which provides advice on industrial relations and employment issues
<a href="http://www.cfa.uk.com">www.cfa.uk.com</a>	Council for Administration
<a href="http://www.cipd.co.uk">www.cipd.co.uk</a>	Chartered Institute of Personnel and Development
<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	The government's Health and Safety Executive, providing information on health and safety rights and responsibilities



# **Unit 204: Principles of Using Systems and Technology in a Contact Centre**

**Unit reference number:** Y/503/0365

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 21

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## **Unit aim**

This unit concerns knowing how to use features of systems and technology to handle customer contacts in a contact centre and understanding contact centre systems and technology.

## **Unit introduction**

Contact centres use a variety of systems and technology to handle contacts with customers. Using that technology is one of the main skills for handling a full range of routine customer contacts. You need to use many features of the systems and technology. You also need to draw down information from the system to generate simple and defined reports. As an agent in a contact centre use of the technology is a key part of the job.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know how to use features of systems and technology to handle customer contacts in a contact centre</p>	<p>1.1 Describe the purpose of a contact distribution system and how it works</p> <p>1.2 State procedures for accessing customer information and customer contact handling</p> <p>1.3 Describe how to adjust individual system settings to facilitate communication with customers</p> <p>1.4 Describe the functionality of a contact distribution system that facilitates customer service</p>
<p>2 Understand contact centre systems and technology</p>	<p>2.1 Describe the customer and contact information needed to produce work plans</p> <p>2.2 Describe the features of systems used to produce customer information and contact handling reports</p> <p>2.3 Explain the importance of checking reports before distribution</p> <p>2.4 Explain the benefits of systems and technology to customers and contact centres</p>

## Unit content

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### 1 Know how to use features of systems and technology to handle customer contacts in a contact centre

*Contact centre distribution systems:* role of contact centres; role of contact centres within organisations; key sectors and industries using contact centres; the customer's role and importance; types of contact centre services and systems eg customer service, direct sales, technical support; emergency call handling eg switchboard, reception; points of contact; hours of opening; contact centre structure, staffing levels, skills needs, personal and professional qualities; guidelines and procedures for handling calls and accessing customer information

*Customer information and contact handling:* key performance indicators – quantity eg percentage calls answered – and quality measurements eg quality of call; monitoring calls; organisational targets; quality standards; customer surveys; recording customer calls; organisational performance eg vision, mission, goals, value statements; individual measurements and performance; evaluating and improving performance; feedback

*System setting adjustment:* methods used to adjust individual settings to facilitate communication with customers

*Uses and functionality of contact centre systems:* technology to include automated call distributors, website portals offering options or services, internal voice recognition, automatic outbound calling tools; specialist software eg call traffic monitoring, customer relationship management, call blending software; workstation technology eg call handling hardware, customer relationship management, customer database, intranet, internet, complaints system

### 2 Understand contact centre systems and technology

*Customer and contact information and work plans:* type of products and services available; target markets; capacity of products and services; unique selling points; life expectancy; maintenance/supplies needed; competition; creating a positive impact with the customer; establishing call objectives; following call conduct guidance ie call answering techniques; projection of the right image and qualities needed eg tone, clarity, confidence, courtesy; establishing identity of caller, following call handling script; level of detail required to process transactions, confirming details of arrangements, security of information; typical contact centre work plans

*System features and reports:* features of systems used to produce customer information and contact handling reports

*Report checking:* importance of checking the accuracy of reports before distribution eg work efficiency, personal and team reputation and pride, customer satisfaction, meeting targets

*Benefits of using systems and technology in contact centres:* benefits to customers and contact centres of systems used to produce customer information and contact handling reports eg efficiency, cost reduction

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of using systems and technology within contact centres. Learners need to know and understand:

- the features of the systems and technology used to handle customer contacts
- how to use the systems and technology used to handle customer contacts.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the systems and technology used to handle customer contacts within contact centres.

Developing knowledge of issues relating to the use of systems and technology used to handle customer contacts within a contact centre environment which is gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing customer contact, for example a supervisor or manager, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a supervisor or manager of a contact centre which deals with customer contact will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how and why systems and technology is used in their centre and how they use the centre's communication systems to feedback to relevant individuals. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, and of communicating effectively with all involved along with the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.



**Assessment**

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

**Indicative resource materials**

**Textbooks**

Bradley S – *S/NVQ Level 2 Customer Service* (Heinemann, 2007)  
ISBN 139780435465292

Carlaw P & Deming VK – *The Big Book of Customer Service Training Games*  
(McGraw Hill, 2007) ISBN 139780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006)  
ISBN 139780471768692

Timm P – *Customer Service: Career Success Through Customer Loyalty* (Prentice Hall, 2010) ISBN 139780135063972

**Journal**

*Customerfirst* (Institute of Customer Service)

**Magazines**

*Call Centre Focus*

*Call Centre Helper*

**Websites**

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. The following may be useful:

<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.cfa.co.uk">www.cfa.co.uk</a>	Council for Administration
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Institute of Customer Service
<a href="http://www.ofcom.org.uk">www.ofcom.org.uk</a>	Ofcom



# **Unit 205: Principles of Communication and Customer Service in a Contact Centre**

**Unit reference number:** L/503/0377

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 12

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## **Unit aim**

This unit concerns knowing the rules of communication and customer service, understanding how to deliver customer service through a contact centre and knowing how to communicate with internal or external customers in written or electronic form in a contact centre.

## **Unit introduction**

Effective communication is an essential part of contact centre operations. Many communications are relatively standard and are covered by organisational guidelines. Communication with customers can be carried either verbally and/or in writing and each of these methods demands different skills. Communication can be in different contexts according to who initiated the contact and the groups of services and/or products you are dealing with.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know the rules of communication and customer service in a contact centre</p>	<p>1.1 Describe procedures for greeting and identifying customers and closing and recording customer contact</p> <p>1.2 Describe the regulatory requirements for dealing with customers</p> <p>1.3 Describe what is meant by a service offer</p> <p>1.4 Describe how the service offer is communicated to customers</p>
<p>2 Understand how to deliver customer service through a contact centre</p>	<p>2.1 Explain the features and benefits of products and/or services offered or supported by a contact centre</p> <p>2.2 Explain why it is important to identify and confirm customers' needs</p> <p>2.3 Explain how to make matches to products and/or services from information provided by customers</p> <p>2.4 Explain the importance of informing customers of what is happening and the reasons for any constraints or limitations</p> <p>2.5 Explain the techniques for establishing a rapport with customers</p>

Learning outcomes	Assessment criteria
<p>3 Know how to communicate with internal or external customers in written or electronic form in a contact centre</p>	<p>3.1 Describe how to identify when a customer would benefit from written or electronic communication</p> <p>3.2 Describe the importance of adhering to guidelines for written or electronic communications</p> <p>3.3 Describe how the language used in written or electronic communication affects customers' attitudes</p> <p>3.4 Describe the importance of proof-reading before sending written or electronic communications</p>

## Unit content

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### 1 **Know the rules of communication and customer service in a contact centre**

*Greeting customers:* company guidelines; appropriate greeting; tone of voice; offering assistance; appropriate form of address; use of customer's name; methods used to identify customers eg answers to previously identified personal information

*Being positive and showing respect towards customers:* using their name; sir/madam; not disagreeing; meeting their needs; being polite; offering assistance; showing respect under any circumstances (quiet period, busy period, when staff missing, interruptions, resources not available, supervisor/line manager/senior staff not available)

*Completing communication:* thanking customer; tone of voice; appropriate form of address; use of customer's name; offering further assistance; confirmation of service

*Regulatory requirements:* current, relevant legislation and regulations to include: equal opportunities (treating everyone as equal, making allowances for customers with disability, treating both genders equally); racial and gender discrimination (not discriminating because of race, or sexual orientation); disability discrimination (access, 'seeing the person, not the disability'); diversity; avoiding assumptions; compliance with Equality Acts 2010 (unlawful to treat people with disabilities less favourably for a reason related to their disability, requirement to make 'reasonable adjustments' for people with disabilities); compliance with Race Relations Acts (protection against discrimination on the grounds of race, colour, nationality, ethnic and national origin in the fields of employment, the provision of goods and services, education and public functions); compliance with Sex Discrimination Acts (protection against discrimination on the grounds of sex, marital status, gender reassignment); compliance with Equality Act 2010

*Importance of confidentiality:* customer data (address, telephone number, spending patterns, debt, credit and debit card details, details of purchases, use to criminals, use to fraudsters, use to competitors); organisational data (sales figures, profit margins, use to competitors; use to criminals); staff data (addresses, home telephone numbers, use by criminals, head-hunters, fraudsters); compliance with Data Protection Act 1998 (written documents kept under lock, access limited to authorised persons, password for access to computer information, only recording relevant information, not passing information to unauthorised third parties, checking authority)

*Other legislation:* Financial Services and Markets Act 2000 (customers protected against mis-selling, protection against fraud, seven-day opt out from agreement clause); Trade Descriptions Act 1968 (goods must be fit for purpose, sales staff must give accurate descriptions, services must be as described); Consumer Credit Act 1974 (14-day opt-out clause for customers, protection for customer if supplier fails to deliver goods/services); Consumer Protection (Distance Selling) Regulations 2000 (give consumers clear information on details of the goods or services offered, delivery arrangements and payment, the supplier's details, the consumer's cancellation right before they buy, cooling-off period of seven working days, providing information in writing); Supply of Goods and Services Act 1982 (carrying out a service with reasonable care and skill within a reasonable time at no more than a reasonable charge, compensation for failure to carry out contract, goods supplied must be as described, of satisfactory quality and fit for purpose)

*Service offer:* definition of 'service offer'; organisational procedures (communicating service offer to customers, keeping records, dealing with enquiries, handling financial transactions, refunds policy, contractual agreements with customers); trade body codes of conduct (Institute of Customer Service, ABTA, Financial Service Authority)

## 2 Understand how to deliver customer service through a contact centre

*Preparing to deal with customers:* methods used to develop knowledge of the features and benefits of products and/or services offered eg induction period, courses; importance of knowing the features and benefits; preparing work area (clean, tidy, safe, well lit, sufficient resources and information at hand); techniques used to establish rapport with the customer eg using their correct name; sir/madam; not disagreeing; being polite; showing respect under all circumstances, following company guidelines

*Identifying customer needs:* importance of identifying and confirming customer needs eg to provide excellent customer service, to meet targets, to reduce complaints; methods used to match customer needs to products and/or services eg use of databases, information leaflets, personal knowledge and experience

*Informing customers:* importance of keeping customers informed of progress eg maintaining customer satisfaction, loyalty, company reputation, meeting service offer; methods of keeping customer informed eg telephone, written, electronic messaging; reasons for passing them on to other people/organisations eg limitations of authority, organisational procedures, ability to deliver; methods of delivering apologies (saying sorry, explaining reasons, offering to correct fault, offering to put right the problem, offering refund, offering new product)

**3 Know how to communicate with internal or external customers in written or electronic form in a contact centre**

*Communicating with customers:* company guidelines for dealing with customers (external, internal); being prompt; keeping customers informed; being positive; using customer's names; being polite; sir/madam; not disagreeing; reasons for understanding and meeting customer needs eg requests for written communications when verbal communications are difficult; benefits of using alternative forms of communication eg clarifying the offer, following company or regulatory requirements; importance of following company guidelines when dealing with customers eg maintaining company policies, brand, reputation

*Quality of communication:* reasons why all communication should be clear and accurate (proofread) eg company style, regulatory, customer satisfaction, business efficiency, signed-off by senior staff; tone of voice; type of language (verbal and written) used; affect of language on customers eg placatory, antagonistic



## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of customer service within contact centres. Learners need to know and understand:

- the rules of communication and customer service
- how to deliver customer service
- how to communicate verbally and in written form with customers.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the processes used to deliver customer service within contact centres.

Developing knowledge of issues relating to the issues surrounding communications with customers within a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing customer service, for example a supervisor or manager, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a supervisor or manager of a contact centre which deals with customer service will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how and why customer service is managed in their centre and how they use the centre's communication systems to feedback to relevant individuals. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, and of communicating effectively with all involved along with the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

### Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

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### Journal

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<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Institute of Customer Service

# Unit 206: Principles of Selling in a Contact Centre

**Unit reference number:** M/503/0386

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 14

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## Unit aim

This unit concerns knowing the process of selling in a contact centre, understanding the use of information for sales activities and how to make sales through a contact centre.

## Unit introduction

Many contact centres carry out direct sales activities. Some sales are the result of incoming contacts from customers. Other sales are the result of outgoing contacts made from the contact centre. Some sales opportunities result from general information and support exchanges with customers who then develop an interest in additional services or products. In any of these situations you must be familiar with the services and/or products that can be offered and with sales techniques that enable you to make the most of sales opportunities that arise.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know the process of selling in a contact centre</p>	<p>1.1 Describe procedures for greeting and identifying customers, authorising payment and closing and recording customer contacts</p> <p>1.2 Describe the regulatory requirements for selling to customers</p> <p>1.3 Describe what is meant by a "service offer"</p> <p>1.4 Describe how the service offer is communicated to customers</p>
<p>2 Understand the use of information for sales activities in a contact centre</p>	<p>2.1 Describe the information needed about products and/or services needed to support sales activities</p> <p>2.2 Explain how to obtain sufficient information from customers to enable a sale</p> <p>2.3 Explain the link between product and/or service and customer information and sales opportunities</p> <p>2.4 Explain how to find new customers for products and/or services</p>

Learning outcomes	Assessment criteria
<p>3 Understand how to make sales through a contact centre</p>	<p>3.1 Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported</p> <p>3.2 Explain why it is important to identify and confirm customers' needs</p> <p>3.3 Explain how to make matches to products and/or services from information provided by customers</p> <p>3.4 Explain the importance of informing customers of what is happening and the reasons for any constraints or limitations</p> <p>3.5 Explain the techniques for establishing a rapport with customers</p> <p>3.6 Explain how to up-sell and cross-sell</p>

## Unit content

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### 1 Know the process of selling in a contact centre

*Procedures:* greeting customers eg organisational procedures for language; identifying customers eg link customer with existing organisational records, organisational procedures to confirm customer identify; authorising payment eg following organisational and legal procedures, ensure customer clear about amount to be charged; closing and recording customer contacts eg obtain all necessary information, update customer records, data protection

*Regulatory requirements:* regulation eg Financial Services Authority, Office of Fair Trading, Trading Standards; legislation eg Data Protection Act, Trade Descriptions Act, Sale of Goods Act, consumer protection legislation

*Service offer:* extent of customer service an organisation offers eg products and/or services available, supporting customers eg help and advice, after sales service, dealing with problems eg full refunds, replacement goods; unique service offers

*How service offer is communicated to customers:* during the selling process eg as sales adviser is dealing with customer enquiry or purchase; information received with delivery of goods; marketing activities eg mail shots, promotional campaigns

### 2 Understand the use of information for sales activities in a contact centre

*Information needed to support sales activities:* customer information eg held by the organisation, feedback, market research; sales data eg direct sales activities; product/service performance

*Obtaining sufficient information from customers:* methods eg telephone surveys, postal surveys; during the selling process eg identify key information to obtain, appropriate questions to facilitate this

*Link between product and/or service and customer information and sales opportunities:* identified gaps in the market, how to improve on competitor offers; sales data eg analyse against customer and market data, inform sales plan and targets eg opportunity for cross and up selling

*New customers for products and/or services:* market research activities eg demand for own product/services, demand for similar product/services; analyse results to identify new customer types eg to include in sales plans

### 3 Understand how to make sales through a contact centre

*Explaining features and benefits of products and/or services:* create sales opportunities; meet customer needs eg remove any preconceptions, match specific features and benefits to customer needs, encourage repeat business; demonstrate up-to-date product knowledge

*Importance of identifying and confirming customer needs:* recommend appropriate product or service eg customer satisfaction, avoid complaints or returns

*Match products and/or services based on customer information:* map key features and benefits against customer requirements ;identify areas/features that are most important to the customer; techniques eg active listening, open questions

*Importance of keeping customers informed:* good customer service eg customer aware of situation, opportunities to choose another product or services

*Techniques for establishing rapport with customers:* active listening; asking customers questions; demonstrate product knowledge eg inspire customer confidence; appropriate manner eg polite, helpful, do not rush customers; adapt style and approach to suit customer

*Cross-selling and up-selling:* identify opportunities eg listen for key words that point to opportunities; select appropriate product or service eg add value to the customer experience, group similar add ons, must be related to what customers are buying, natural upgrades; protect existing relationships eg do not suggest unrelated products/services, do not suggest too large a number

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of selling within contact centres and how to make a sale. Learners need to know and understand:

- organisational procedures for dealing with customers, from the initial greeting to closing the customer contact
- the regulations that apply to selling to customers
- how to obtain and use information to support sales activities
- how to make a sale, including establishing customer needs and matching these to appropriate products and services.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the selling process within a contact centre.

Knowledge of issues relating to sales in a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others who carry out a sales function within a contact centre, for example a sales adviser, where possible, and through the use of guest speakers and video or DVD training programmes.

For example, a presentation by a contact centre sales manager will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how sales activities are handled in their centre and how all staff work to ensure customers receive the appropriate product and service and have a positive customer service experience. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with the associated regulations, of obtaining appropriate and sufficient information, of supporting customers through the selling process and of maximising sales opportunities.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.



## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Bacal R – *Perfect Phrases for Customer Service* (McGraw Hill Professional, 2005 )  
ISBN-10007144453X

Freemantle D – *The Buzz 50 Little Things That Make a Big Difference to Serve Your Customers* (Nicholas Bentley Publishing, 2004) ISBN 1857883470

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006)  
ISBN-100471768693

### Magazines

*Call Centre Focus*

*Call Centre Helper*

*Customer First – Institute of Customer Service*

### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. Other websites address legislation and regulatory issues. The following may be useful:

<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Institute Of Customer Service
<a href="http://www.legislation.gov.uk">www.legislation.gov.uk</a>	Official home of UK legislation
<a href="http://www.tradingstandards.gov.uk">www.tradingstandards.gov.uk</a>	Trading Standards Institute



# Unit 207: Principles of Handling Incidents through a Contact Centre

**Unit reference number:** M/503/0405

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 18

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## Unit aim

This unit concerns knowing the standards and procedures for dealing with incidents in a contact centre, understanding how to use contact centre communications systems to deploy incident management resources and how to deal with incidents reported to a contact centre.

## Unit introduction

Some contact centres have specific responsibilities for dealing with emergency contacts. This involves contacts where the person expects the contact centre to be immediately responsive. The work demands close attention to previously established procedures that are designed to identify what is needed as quickly and accurately as possible. That is followed by effective and controlled communication with those who can respond quickly and provide the help that has been requested.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Know the standards and procedures for dealing with incidents in a contact centre</p>	<p>1.1 Describe the standards and procedures for handling incidents</p> <p>1.2 Describe techniques for controlling conversations with contacts</p> <p>1.3 Describe how to prioritise reported incidents</p> <p>1.4 Describe the information needs of those taking action over incidents</p> <p>1.5 Describe why and to whom to escalate incident responses</p>
<p>2 Understand how to use contact centre communications systems to deploy incident management resources</p>	<p>2.1 Explain how to choose the most efficient means to communicate with those dealing with the incident</p> <p>2.2 Explain the agreed conventions of wording, codes, style and approach for different media options</p>
<p>3 Understand how to deal with incidents reported to a contact centre</p>	<p>3.1 Describe the impact of regulation or legislation on incident management</p> <p>3.2 Explain the use of decision trees</p> <p>3.3 Explain the basis on which incidents should be escalated</p> <p>3.4 Describe the limitations of the instructions and advice that can be passed on to someone reporting an incident</p> <p>3.5 Describe the type and extent of resources available to deal with incidents</p>

## Unit content

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### 1 Know the standards and procedures for dealing with incidents in a contact centre

*Standards and procedures:* eg responsibilities on the scene, determining level of response, response times, lines of reporting; for providing information eg accurate, to the correct people, within timescales; completing and maintaining necessary records; sources of advice and information

*Techniques for controlling conversations:* tone and manner eg remaining calm, controlled, reassuring; questioning and listening techniques eg obtain key details, confirm own understanding, caller clear about proposed action/response

*Prioritise reported incidents* types of incident eg non-routine, major, emergency, fire, accident, terrorist; Civil Contingencies Act definitions; causes eg human error, natural, chemical reaction, technological failure; nature of the incident eg level of risk, level of threat posed, casualties; organisational procedures eg criteria to determine level of response; inter-agency approaches and agreements

*Information needs:* access to accurate, timely information; type and seriousness of the incident eg number of casualties, level of damage, risks and threats, agencies already on-site; maintaining information flow

*Escalate incident responses:* organisational procedures for assessing incidents eg categories of incident, criteria; ensure correct level of response eg number and type of personnel, equipment, informing other agencies; organisational lines of reporting eg communications cascade system, operational (bronze), tactical (silver), strategic (gold) chain of command, external agencies, on-site teams

### 2 Understand how to use contact centre communications systems to deploy incident management resources

*Efficient means to communicate:* providing accurate information; within necessary timeframes; keeping appropriate people informed eg incident log; communication channels; how and when to communicate with external organisations and agencies eg frequency and type of contact with those on-site; communication methods eg mobile voice (radio, telephone), fixed voice (telephone, intercom), electronic (email, data transfer)

*Conventions of wording, codes, style and approach for different media options:* organisation's standard wording and codes for communication eg clear speech wording, radio codes; inter-agency understanding; tactical language eg terrorist incident, encryption, sensitive communications

### 3 Understand how to deal with incidents reported to a contact centre

*Impact of regulation or legislation:* relevant legislation and regulations eg Health and Safety at Work Act, Control of Substances Hazardous to Health Regulations (COSHH), Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR), Hazard Analysis Critical Control Points (HACCPs), HSE regulations; Civil Contingencies Act; role of statutory agencies eg highways department; requirement for internal and external audits eg risk assessment, public scrutiny of incident management; impact on own job role; organisational and individual legal responsibilities; need for staff training and updating

*Use of decision trees:* model of decisions and possible consequences eg chance event outcomes, resource costs; decision analysis eg identify appropriate strategy, course of action, issues and relationship between events

*Basis on which incidents should be escalated:* following initial assessment eg feedback from on-site team; against established criteria eg level of threat, potential for harm or injury; correct reporting lines eg command chains in the emergency services

*Limitations of instructions and advice:* in line with organisational policies and procedures eg authority level of job role; potential for miscommunication eg ineffective communication methods, equipment limitations; unfamiliar situations; uncertainty of on-site situation eg on-site team out of contact range

*Type and extent of resources available:* providing accurate information to deploy resources eg equipment, tools, people; specialist resources eg emergency medical team, bomb disposal, underwater search; use and coordination of ICT resources; inter-agency cooperation; cost implications; voluntary agencies eg St John Ambulance, British Red Cross.

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of incident handling through contact centres. Learners need to know and understand:

- the standards and procedures for dealing with incidents
- how to prioritise and escalate incidents
- how to use the contact centre's communication systems to deploy resources
- how to maintain effective communication with those dealing with the incident.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of handling incidents within contact centres.

Knowledge of issues relating to handling incidents in a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing incident handling, for example a duty officer, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a manager of a contact centre which deals with incidents will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how incident handling is managed in their centre and how they use the centre's communication systems to deploy the appropriate resources. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, of prioritising incidents and allocating resources correctly, and of communicating effectively with all involved, and the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Department of National Heritage (now DCMS) – *Guide to Safety at Sports Grounds (The Stationery Office, 1997)* ISBN 0 1130 0095 2

Frosdick S et al – *Safety and Security at Sports Grounds* (Paragon Publishing, 2005) ISBN 9781899820146

Health and Safety Executive – *Emergency Planning for Major Accidents: Control of Major Accident Hazards Regulations 1999* (HSE Books, 1999) ISBN 0717616959

Health and Safety Executive – *Essentials of Health and Safety At Work* (HSE Books, 2006) ISBN 9780717661794

Health and Safety Executive – *Investigating Accidents and Incidents HSG 245* (HSE Books, 2004) ISBN 9780717628278

*Major Incident Procedure Manual (6th edition)* (London Emergency Services Liaison Panel, 2004)

### Magazines

*Call Centre Focus*

*Call Centre Helper*

### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. County or borough council major incident plans/guides are available on council websites. Other websites address legislation and regulatory issues. The following may be useful:

<a href="http://www.britsafe.org">www.britsafe.org</a>	British Safety Council
<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.hse.gov.uk">www.hse.gov.uk</a>	Health and Safety Executive
<a href="http://www.iosh.co.uk">www.iosh.co.uk</a>	Institution of Occupational Safety and Health
<a href="http://www.jems.com">www.jems.com</a>	Emergency services resources
<a href="http://www.rospa.com">www.rospa.com</a>	Royal Society for the Prevention of Accident



## **Unit 208: Principles of Legal, Regulatory and Ethical Requirements of a Contact Centre**

**Unit reference number:** F/503/0411

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 15

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### **Unit aim**

This unit concerns understanding of a contact centre's procedures and limits for dealing with its legal, regulatory and ethical requirements.

### **Unit introduction**

Contact centres have systems and procedures to ensure that they comply with legal, regulatory and ethical requirements.

Those systems and procedures are guided by policies that seek to balance the business needs of the contact centre with the requirements of the legal, regulatory and ethical requirements.

Policies and procedures must be reviewed and developed from time to time and, if appropriate, adjusted to reflect changes in the legal, regulatory and ethical requirements while meeting operational needs in a contact centre.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements in a contact centre</p>	<p>1.1 Describe an organisation's procedures for raising legal, regulatory and ethical concerns</p> <p>1.2 Explain the scope of legal, regulatory and ethical requirements in a contact centre</p> <p>1.3 Explain how the legal, regulatory and ethical requirements relate to a contact centre</p> <p>1.4 Describe internal and external sources of information on legal, regulatory and ethical requirements</p> <p>1.5 Explain how an "ethical approach" affects a contact centre</p> <p>1.6 Explain the importance of contract law in a contact centre</p>
<p>2 Understand the legal, regulatory and ethical limits of contact centre work</p>	<p>2.1 Explain the legal, regulatory and ethical requirements relevant to the role</p> <p>2.2 Describe the potential consequences of not complying with legal, regulatory or ethical requirements</p> <p>2.3 Explain the importance of working within the limits of the role, responsibilities and authority</p> <p>2.4 Explain the process for reporting legal, regulatory and ethical concerns</p> <p>2.5 Explain the importance of clarity of communication with the customer to ensure common understanding of agreements and expectations</p>

## Unit content

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### 1 **Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements in a contact centre**

*Contact centres:* role of contact centres; role of contact centres within organisations; key sectors and industries using contact centres; the customer's role and importance; types of contact centre services eg customer service, direct sales, technical support, emergency call handling, reception; points of contact; hours of opening; technology; processes

*Legal requirements:* current, relevant legislation to include the Equality Act 2010, the Data Protection Act 1998, the Health and Safety at Work Act 1974, the Manual Handling Operations Regulations 1992, the Provision and Use of Work Equipment Regulations 1996, the Health and Safety (Display Screen Equipment) Regulations 1992 and 2002, protection of whistleblowers, contract law; reasons why they exist, their importance and how they relate to contact centres

*Regulatory requirements:* current, relevant Ofcom regulations eg monitoring and recording calls; Ofcom codes of practice eg complaints handling; reasons why they exist and relate to contact centres

*Ethical requirements:* definition of 'ethics' and an 'ethical approach'; social ethics; personal ethics; fair trading; employee rights; potential situations eg intensive employee performance monitoring and management; reasons why they exist and how they can affect contact centres

*Organisational procedures:* relating to raising legal, regulatory and ethical concerns; internal and external sources of information on legal, regulatory and ethical requirements eg library, internet, intranet

### 2 **Understand the legal, regulatory and ethical limits of contact centre work**

*Contact centre people, teams and job roles:* contact centre structures; job roles; levels of authority and limitations of authority (relating to legal, regulatory and ethical requirements); staffing levels; skills needs; personal and professional qualities; importance of the clarity of communication with customers to ensure common understanding of agreements and expectations

*Legal, regulatory and ethical requirements:* importance of working within the limits of the role, responsibilities and authority; potential consequences for failing to comply with responsibilities

*Reporting processes:* organisational processes for reporting legal, regulatory and ethical concerns

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the legal, regulatory and ethical requirements within contact centres. Learners need to know and understand:

- an organisation's procedures for dealing with legal, regulatory and ethical requirements
- the legal, regulatory and ethical limits of contact centre work.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the procedures and limits for dealing with legal, regulatory and ethical requirements within contact centres.

Developing knowledge of issues relating to legal, regulatory and ethical requirements within a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing an organisation's procedures, for example a supervisor or manager, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a supervisor or manager of a contact centre which deals with an organisation's procedures will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how and why their centre has procedures and limits to deal with legal, regulatory and ethical requirements and how they use the centre's communication systems to feedback to relevant individuals. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, and of communicating effectively with all involved along with the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Bee, R and F – *Learning Needs Analysis and Evaluation* (Chartered Institute of Personnel and Development, 2003) ISBN 9780852929674

Calvert, N – *Gower Handbook of Call and Contact Centre Management* (Gower Publishing Ltd, 2004) ISBN 9780566085109

Wellington, P – *Effective People Management* (Kogan Press, 2011) ISBN 9780749462857

Wilson, J P – *The Call Centre Training Handbook: A Complete Guide to Learning and Development in Contact Centres* (Kogan Press, 2008) ISBN 9780749450885

Winstanley, D – *Personal Effectiveness* (Chartered Institute of Personnel and Development, 2005) ISBN 9781843980025

### Magazines

*Call Centre Focus*

*Call Centre Helper*

### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. The following may be useful:

<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.ccma.org.uk">www.ccma.org.uk</a>	Call Centre Management Association
<a href="http://www.cipd.co.uk">www.cipd.co.uk</a>	The Chartered Institute of Personnel and Development
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.ofcom.org.uk">www.ofcom.org.uk</a>	Ofcom



# Unit 304: Principles and Processes of Systems and Technology in a Contact Centre

**Unit reference number:** T/503/0373

**Level:** 3

**Credit value:** 4

**Guided learning hours:** 26

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## Unit aim

This unit concerns understanding how to design new reports in a contact centre, how to optimise performance through systems and technology and the use of contact centre systems and technology.

## Unit introduction

Contact centres use a variety of systems and technology to handle contacts with customers. Operational use of the systems and technology is carried out by agents and team leaders. Some have authority to adjust parameters and make decisions about routing to ensure that service is effective and efficient. They may also make recommendations about more fundamental modifications and enhancements which are considered by those with authority in that area. Overall systems and technology must be managed by coordinating output, supporting staff, monitoring report output, considering enhancements and managing system development.

All contact centres place a heavy reliance on systems and technology. Operational use, monitoring and operational management of those systems ensure that day-to-day service can be delivered efficiently and effectively. However, systems cannot maintain efficiency and effectiveness in the face of new technology development and the activities of perceived competitors. Strategy and policy on use of systems and technology must reflect overall business and must translate into practical actions for development and improvement where opportunities exist.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand how to design reports in a contact centre	1.1 Explain how to identify metrics to be included in reports 1.2 Explain what needs to be included in reports 1.3 Describe standards and guidelines for the presentation of reports
2 Understand how to optimise performance in a contact centre through systems and technology	2.1 Explain how coaching/buddying activities improve colleagues' use of systems and technology 2.2 Explain the effects of alterations to applications and systems 2.3 Explain how routing rules can be adjusted to meet changing priorities and resources 2.4 Explain how to identify data flow changes and why this is important
3 Understand the use of contact centre systems and technology	3.1 Describe how systems and technology address changes resulting from legislation and regulation 3.2 Explain parameters for system configuration 3.3 Explain the importance of predictive contact queuing to efficient operations



## Unit content

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### 1 Understand how to design reports in a contact centre

*Real-time reporting:* definition of 'metrics'; types of report eg agent , system, topical, table, graphical; standards and guidelines for reports

*Standards and guidelines:* for reports eg to meet goals, corporate style, clarity; metrics to monitor in real-time and to include in reports eg corporate and personal data; effectiveness of system eg is corporate vision and mission achieved, do the goals align with teams' key performance indicators (KPIs); impact of achieving or not achieving goals

### 2 Understand how to optimise performance in a contact centre through systems and technology

*Best practice:* methods used when deploying Customer Relationship Management (CRM) applications eg setting content and time boundaries, managing experts, controlling the content; induction programme; advantages and disadvantages of coaching, mentoring and buddy systems relating to colleagues' use of systems and technology

*Changes to applications and systems:* role of software and systems in providing business efficiencies; advantages and disadvantages of automated help lines eg cost saving, customer frustration; self-healing diagnostic tools; help desk; customer service call management platforms; adjustment of routing rules to aid business efficiency (changing priorities and resources)and image

*Data flow:* importance of and reasons for identifying steps in project management eg to build realistic timelines, build cross-functional teams, improve business efficiency and image; current technologies

### 3 Understand the use of contact centre systems and technology

*Systems and technology:* systems and technology as an enabling function within a contact centre; requirement to address changes in relevant legislation and regulation eg Data Protection Act 1998, Fair Trading Acts, Distance Selling Regulations, Ofcom regulations; key performance indicators (KPIs) built around technology eg consistent service, revenue generation; merging new and existing technologies as seamless consolidation; business value of new systems through metrics and measurements; configuration parameters eg predictive contact queuing; importance of predictive contact queuing to business efficiency and image

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles and processes of systems and technology within contact centres. Learners need to know and understand:

- how to design reports
- how to optimise performance through systems and technology
- the use of systems and technology.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the principles and processes of systems and technology within contact centres.

Developing knowledge of issues relating to the principles and processes of systems and technology within a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing systems and technology, for example a supervisor or manager, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a supervisor or manager of a contact centre dealing with systems and technology will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how and why the systems and technology are managed in their centre and how they use the centre's communication systems to feedback to relevant individuals. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, and of communicating effectively with all involved along with the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

### Indicative resource materials

#### Textbooks

Bee ,R and F – *Learning Needs Analysis and Evaluation* (Chartered Institute of Personnel and Development, 2003) ISBN 9780852929674

Calvert, N – *Gower Handbook of Call and Contact Centre Management* (Gower Publishing Ltd, 2004) ISBN 9780566085109

Wellington, P – *Effective People Management* (Kogan Press, 2011) ISBN 9780749462857

Wilson, J P – *The Call Centre Training Handbook: A Complete Guide to Learning and Development in Contact Centres* (Kogan Press, 2008) ISBN 9780749450885

Winstanley, D – *Personal Effectiveness* (Chartered Institute of Personnel and Development, 2005) ISBN 9781843980025

#### Magazines

*Call Centre Focus*

*Call Centre Helper*

#### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. The following may be useful:

<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.cfa.co.uk">www.cfa.co.uk</a>	Council for Administration
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Institute of Customer Service
<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.ofcom.org.uk">www.ofcom.org.uk</a>	Ofcom



# Unit 305: Principles of Customer Service in a Contact Centre

**Unit reference number:** F/503/0389

**Level:** 3

**Credit value:** 4

**Guided learning hours:** 26

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## Unit aim

This unit concerns understanding customer service in a contact centre, how to resolve issues in customer service, how to monitor customer service performance and compliance and how to communicate verbally and in written or electronic form with customers referred by others in a contact centre.

## Unit introduction

Contact centres by definition have customer contact at the core of their work. Whatever services and/or products are being provided by a contact centre, there will be a wish to make the contact as positive and respectful as possible. Customer service will be built into policies and procedures and provide guidelines and pointers for how you can make the best out of the customer contact. In many contact centres customer focus is a key part of the culture whilst ensuring that the service is efficient.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
1 Understand customer service in a contact centre	1.1 Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported 1.2 Explain how organisational and regulatory requirements affect the delivery of customer service 1.3 Describe the importance of having customer service aims, objectives and service offers 1.4 Explain how to design Key Performance Indicators (KPIs)
2 Understand how to resolve issues in customer service in a contact centre	2.1 Explain how and why customer service issues are escalated 2.2 Explain how to validate customers' identity 2.3 Explain the techniques for establishing a rapport with customers 2.4 Explain how to balance the needs of the organisation with those of customers when resolving customer service issues 2.5 Explain the importance of informing customers of what is happening and the reasons for any constraints or limitations

Learning outcomes	Assessment criteria
<p>3 Understand how to monitor customer service performance and compliance within a contact centre</p>	<p>3.1 Describe the scope of what needs to be monitored in customer service performance and compliance</p> <p>3.2 Explain the use of Key Performance Indicators (KPIs) in testing the quality of customer service delivery</p> <p>3.3 Describe how to validate monitoring data</p> <p>3.4 Explain how to analyse monitoring data to identify areas for enhancement</p> <p>3.5 Describe who needs to be informed of monitoring results and why</p>
<p>4 Understand how to communicate verbally and in written or electronic form with customers referred by others in a contact centre</p>	<p>4.1 Explain the need for procedures and guidelines for verbal and written communications</p> <p>4.2 Explain how to adapt the use of language to meet customers' needs</p> <p>4.3 Explain the strengths and weaknesses of verbal and written communications</p> <p>4.4 Explain how to identify inadequacies in the standard of colleagues' communications with customers</p>

## Unit content

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### 1 Understand customer service in a contact centre

*Customer expectations and satisfaction:* definition of customer service; reasons why the features and benefits of products and/or services provided are explained to customers; types of internal customer (colleagues, supervisors, staff, suppliers, agents, staff teams); types of external customer including existing, new, individuals, groups, business people, non-English speaking, different ages, different cultures, gender, families, with special needs (visual, hearing, mobility impairments); identifying customer needs; value for money; accuracy and reliability; providing information and advice; providing assistance and help; organisational targets; dealing with special needs; dealing with problems; health and safety; security

*Organisational and regulatory requirements:* ensuring customers are treated fairly; ensuring safety of staff and customers; reducing errors; avoiding litigation; maintaining secure data; ensuring consistent service; avoiding theft; avoiding fraud; compliance with Health and Safety at Work Act, 1974; compliance with fire regulations and emergency procedures; compliance with Health and Safety (Display Screen Equipment) Regulations; equal opportunities; racial and gender discrimination; disability discrimination; diversity; avoiding assumptions; compliance with Race Relations Act 1976; compliance with Sex Discrimination Act; compliance with Equality Act 2010; confidentiality of customer and organisational data eg staff data; compliance with Data Protection Act 1998 (written documents kept under lock, access limited to authorised persons, password for access to computer information, only recording relevant information, not passing information to unauthorised third parties, checking authority); Financial Services and Markets Act 2000 (customers protected against misselling, protection against fraud, seven-day opt out from agreement clause); Trade Descriptions Act 1968 (goods must be fit for purpose, sales staff must give accurate descriptions, services must be as described; Consumer Credit Act 1974 (14-day opt-out clause for customers, protection for customer if supplier fails to deliver goods/services); Consumer Protection (Distance Selling) Regulations 2000 (give consumers clear information on details of the goods or services offered, delivery arrangements and payment, the supplier's details, the consumer's cancellation right before they buy, cooling-off period of seven working days, providing information in writing); Supply of Goods and Services Act 1982 (carrying out a service with reasonable care and skill within a reasonable time at no more than a reasonable charge, compensation for failure to carry out contract, goods supplied must be as described, of satisfactory quality and fit for purpose); organisational procedures (keeping records, dealing with enquiries, handling financial transactions, refunds policy, contractual agreements with customers); trade body codes of conduct (Institute of Customer Service, ABTA, Financial Service Authority); meeting National Occupational Standards (Institute of Customer Service, NVQs); effects (pressures on time, increasing costs, increasing levels of professionalism, protecting organisation from litigation, maintaining company image, meeting legal requirements, maintaining up-to-date records)



*Organisational customer service aims, objectives and service offers:* types of; reasons for; importance of

*Key Performance Indicators:* reasons for; types of eg calls handled per hour, average length of call, sales per hour, first time resolution; design features

## 2 **Understand how to resolve issues in customer service in a contact centre**

*Escalating issues:* reasons for escalating issues; methods of escalating issues (passing to supervisor, limit of authority when dealing with queries, knowing what supervisor can do to help customer); recognising potential problem situations eg by tone of voice, type of language used, agitated customers, changed delivery dates, failure of supplier to deliver

*Validating customers' identity:* reasons for validating customers' identity; types of customer (external, internal); methods of validating a customer's identity eg asking personal questions which the customer has previously given the answer to

*Establishing rapport with customers:* using customer's names; being polite; sir/madam; not disagreeing; understanding needs; meeting their needs; being prompt; keeping customers informed; being positive; benefits of alternatives; being reassuring; explaining problem; being seen to act; showing empathy; reasons for not using negative communication activities eg ignoring customer, arguing, disagreeing, negative tone of voice

*Balancing the needs of the organisation with those of the customer:* organisation vision and ethos; policies and procedures for security (of personnel, data, equipment, premises, visitors, confidentiality); policies on customer service (returns procedure, refund procedure, return of goods, dealing with complaints); procedures for providing feedback to management (telephone, face to face, written, electronic messaging, chasing up queries, staff meetings); checking customer understanding; checking facts; checking with person being complained about

*Keeping customers informed:* importance of keeping customers informed of progress eg customer satisfaction and loyalty; types and reasons for constraints and limitations relating to customer contacts eg limited authority of different levels of staff

### 3 Understand how to monitor customer service performance and compliance within a contact centre

*Monitoring customer service performance and compliance:* reasons for monitoring eg reputation, good media reports, public relations, commercial viability; benefits (repeat business, satisfied customers, reduced complaints, meeting customer expectations, customer loyalty);

company, team and individual sales targets (improved through good customer service, more sales through good reputation, increase in loyalty customers, increase in repeat customers due to good service, staff training and motivation); profit targets (more sales potentially leading to more profit, more efficient customer service leading to less overheads, less complaints leading to less expense); better service leads to reduction in complaints; better service leads to better market position

*Use of Key Performance Indicators (KPIs):* use in testing the quality of customer service delivery eg number of complaints, speed of response

*Validating monitoring data:* reasons for validating monitoring data; methods used to include surveys of customer satisfaction, monitoring complaints, mystery shoppers, and the number of repeat customers

*Analysing monitoring data:* methods of analysing monitoring data to identify areas for improvement to include surveys of customer satisfaction, monitoring complaints, mystery shoppers, and the number of repeat customers

*Organisational hierarchy:* job roles and responsibilities relating to customer service performance and compliance; reasons for responsibilities

### 4 Understand how to communicate verbally and in written or electronic form with customers referred by others in a contact centre

*Organisational procedures and guidelines for customer contact:* reasons for eg maintaining a corporate reputation and image; types of procedure and guideline; record keeping for audit purposes (electronic and paper-based)

*Adapting language used in customer contacts:* methods of adapting language for use with diverse groups of customers (regular, loyal, first time, different language or culture, customers unfamiliar with the organisation, vision impaired, hearing impaired); formal; informal; legibility; face to face; telephone voice; electronic methods; presentation; listening (showing understanding, repeating back); asking open questions about customer requirements; using Braille; using large text; providing contact in a variety of languages

*Strengths and weaknesses of verbal and written communication:* strengths and weaknesses of types of written and verbal communication; importance (delivering effective customer service, meeting customer expectations, creating a favourable image, avoiding mistakes and errors, avoiding customer complaints, developing customer confidence, ensuring understanding)

*Identifying inadequacies in the standard of a colleague's communication with customers:* reasons for managing situations sensitively; company procedures; symptoms of poor communication eg complaints, repeat questioning, loss of business

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of customer service within contact centres. Learners need to know and understand:

- the processes involved in delivering customer service
- how to resolve issues in customer service
- how to monitor customer service performance
- how to communicate verbally and in written form with customers.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the processes used to deliver customer service within contact centres.

Developing knowledge of issues relating to customer service within a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others responsible for dealing with or managing customer service, for example a supervisor or manager, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a supervisor or manager of a contact centre which deals with customer service will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how and why customer service is managed in their centre and how they use the centre's communication systems to feedback to relevant individuals. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with organisational and legal requirements, and of communicating effectively with all involved along with the consequences if this does not happen.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

### Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Bradley S - *S/NVQ Level 2 Customer Service* (Heinemann, 2007) ISBN 139780435465292

Carlaw P and Deming VK - *The Big Book of Customer Service Training Games* (McGraw Hill, 2007) ISBN 139780077114763

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006) ISBN 139780471768692

Timm P - *Customer Service: Career Success Through Customer Loyalty* (Prentice Hall, 2010) ISBN 139780135063972

### Journal

*Customerfirst* (Institute of Customer Service)

### Magazines

*Call Centre Focus*

*Call Centre Helper*

### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. The following may be useful:

<a href="http://www.cfa.co.uk">www.cfa.co.uk</a>	Council for Administration
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Institute of Customer Service
<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and information
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World

## Unit 306: Principles of Sales Activities and Customer Support in a Contact Centre

**Unit reference number:** J/503/0393

**Level:** 3

**Credit value:** 4

**Guided learning hours:** 24

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### Unit aim

This unit concerns understanding the process of selling in a contact centre, the use of contact centre sales data, how to lead a sales team in a contact centre and customer complaints and non-compliance issues in a contact centre.

### Unit introduction

Many contact centres carry out direct sales activities. These may be through inbound or outbound contacts and may or may not be the primary purpose of a particular contact. Sales processes may be basic and involve order-taking, routine involving a defined set of services or products or complex involving matching customer wishes or needs with any available service and/or product. Contact centre teamwork supports learning between colleagues especially in challenging areas such as sales. Sales plans are devised using available sales, market and customer information and are generally backed by targets agreed with team members.

Many contact centres exist to provide information and support to customers using a range of services or products. Providing that support requires detailed knowledge and understanding of the services and/or products together with the communication skills to deal with customers. It also involves teamwork so that colleagues learn from each other as the organisation gains experience and services and/or products develop. You need to have experience and some senior authority to be able to support colleagues learning as well as dealing with more complex customer matters.

This standard is about operating in a support role for all types of customer queries and also working with colleagues to advance their learning.

## Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

### On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand the process of selling in a contact centre</p>	<p>1.1 Explain the information needed to prepare for sales activities</p> <p>1.2 Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported</p> <p>1.3 Describe the impact of legislation on selling</p> <p>1.4 Explain how to offer options to customers by linking wishes and needs to products and/or services</p> <p>1.5 Explain techniques to adapt sales styles to mirror customers' behaviour</p> <p>1.6 Explain techniques for overcoming customers' objections and questions</p> <p>1.7 Explain techniques for closing the sale</p> <p>1.8 Explain techniques for up-selling and cross-selling</p> <p>1.9 Describe procedures for authorisation of payment and recording customers' orders</p>
<p>2 Understand the use of contact centre sales data</p>	<p>2.1 Explain how sales data should be collated to enable data manipulation</p> <p>2.2 Describe current market and customer trends</p> <p>2.3 Explain analysis techniques to compare performance against benchmarks</p> <p>2.4 Explain how the results will be used to inform sales plans</p>

Learning outcomes	Assessment criteria
<p>3 Understand how to lead a sales team in a contact centre</p>	<p>3.1 Explain how to identify sales activities that are capable of fulfilling a sales plan</p> <p>3.2 Explain how to set stretching but realistic and achievable targets</p> <p>3.3 Explain how to monitor team performance toward targets</p> <p>3.4 Explain how to identify opportunities for improving sales performance</p> <p>3.5 Explain how advice and support for colleagues increases their understanding of sales-related requirements</p> <p>3.6 Explain the importance of setting a good example and encouraging colleagues</p>
<p>4 Understand customer complaints and non-compliance issues in a contact centre</p>	<p>4.1 Describe the stages for dealing with customer complaints</p> <p>4.2 Explain what constitutes non-compliance with legal and regulatory requirements</p> <p>4.3 Explain the implications of non-compliance with legal and regulatory requirements</p> <p>4.4 Explain the importance of complying with breaches of service offers and the impact of non-compliance</p> <p>4.5 Explain the impact of non-compliance with a service offer</p>

## Unit content

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### 1 Understand the process of selling in a contact centre

*Information needed to prepare for sales activities:* customer information eg held by the organisation, feedback, market research; sales data eg direct sales activities, product/service performance; service or product information eg identified gaps in the market, how to improve on competitor offers, alternative products or services to meet customer needs

*Describing features and benefits of products and/or services to customers:* create sales opportunities; meet customer needs eg remove any preconceptions, match specific features and benefits to customer needs, encourage repeat business, reassure customers about after sales support; demonstrate up-to-date product knowledge

*Impact of legislation on selling:* regulation and legislation eg Financial Services Authority, Office of Fair Trading, Trading Standards, Data Protection Act, Trade Descriptions Act, Sale of Goods Act, consumer protection legislation; impact eg operational framework, maintenance of quality standards, fair and reasonable pricing of goods products sold as described and fit for their purpose, requirement to provide refunds/exchanges, requirement to explain all finance arrangements including cooling-off periods; staff training

*Offering product/service options linked to customer wishes:* map key features and benefits against customer requirements; identify areas/features that are most important to the customer; techniques eg active listening, open questions

*Adapt sales style to mirror customer behaviour:* importance eg mirror customer styles and perceptions, when introducing new products and services

*Techniques for overcoming customer objections and questions:* different types of objection eg straight denial, hidden, sincere/insincere; techniques eg adjust selling approach and style, acknowledge objection, agree with and counter objection, questioning, negotiation

*Techniques for closing the sale:* ask customer whether they would like to purchase, how they will pay; offer accessories, enhancements, incentives techniques eg summarise, confirm, concession close, 'puppy dog close'

*Cross-selling and up-selling:* identify opportunities eg listen for key words that point to opportunities; select appropriate product or service eg add value to the customer experience, group similar add ons, must be related to what customers are buying, natural upgrades; protect existing relationships eg do not suggest unrelated products/services, do not suggest too large a number

*Procedures for authorising payments and recoding customer orders:* organisational procedures and legal requirements; authorising payment eg confirm type of payment and payment details with customer, ensure customer clear about amount to be charged, safety and security arrangements; recording customer orders eg obtain all necessary information, update customer records, include any special requirements or requests, data protection, confirm order with customer



## 2 Understand the use of contact centre sales data

*Collection of sales data:* collection eg through direct sales activities, electronically from sales team laptops/PDAs, retrieving and analysing data, loading onto appropriate database for manipulation; key sales data eg sales (monetary or units), market share, number of enquiries, reduced complaints

*Current market and customer trends:* sales data against market and customer data; trends eg short term, long term, seasonal, gradual changes, influence of social networks; changes in buyer behaviour eg customers want key product/service information quickly

*Analysis techniques to compare performance against benchmarks:* benchmark eg point of reference to measure current success to determine future plans; techniques eg organise data to identify performance gaps, compare current performance, identify causes of any gaps; factors affecting performance eg IT, organisational policies, skills/knowledge of staff

*Using results to inform sales plans:* summarise results to form basis of a sales plan eg need to focus on underperforming products/services, new customers for products and/or services, demand for own product/services, demand for similar product/services

## 3 Understand how to lead a sales team in a contact centre

*Identify sales activities to fulfil a sales plan:* agree sales activities with colleagues; relate to identified and planned objectives and targets; relate to organisation's overall sales objectives

*Target setting:* agree targets with team eg cross and up selling, dates for achievement, number and types of customers needed to meet sales targets; relate to sales plans and organisation's overall sales strategy

*Monitor team performance towards targets:* methods eg appraisals, one-to-one interviews, call monitoring; basic key performance indicators eg calls handled per hour, sales per hour, sales per call; internal and external factors affecting performance

*Opportunities to improve sales performance:* review sales performance against sales targets eg opportunities to cross and up sell, extend service offer; update product knowledge eg training and development needs; SWOT (internal strengths and weaknesses, external opportunities and threats)

*Providing advice and support for colleagues:* develop sales skills and techniques, support colleagues when making decisions about product/services for their customers

*Setting a good example and encouraging colleagues:* during sales activities; buddying schemes

#### 4 **Understand customer complaints and non-compliance issues in a contact centre**

*Stages in dealing with customer complaints:* within limit of own authority eg escalate if necessary, accept referred customer contacts; stages eg receive, acknowledge and log complaint, investigate to establish validity of the complaint, respond to the customer, complete appropriate documentation to record actions taken, report outcomes to relevant people

*Non-compliance with legal and regulatory requirements:* failure or refusal to comply with legal and regulatory requirements; possible civil or criminal offence

*Implications of non-compliance:* legal consequences eg prosecution, imprisonment, fines, other financial penalties; business consequences eg lose licence, lose customers, damaged reputation, reduced sales, reduced profit, difficulties gaining credit

*Impact of non-compliance with a service offer:* breach of contract eg possible legal action; customer dissatisfaction eg breach of trust, loss of goodwill and loyalty; lose customers; damaged reputation; loss of business

## Essential guidance for tutors

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### Delivery

This unit should be delivered in a way that develops learner knowledge and understanding of the principles of sales activities and customer support within contact centres. Learners need to know and understand:

- how to prepare and carry out sales activities, including techniques to overcome objections, close sales and up-sell and cross-sell
- the legislation that applies to selling and the consequences of non-compliance
- how to lead a team in a contact centre, including monitoring and improving sales performance
- how to use and manipulate sales data to analyse performance and inform sales plans.

A useful opening would be through small group discussions, during which learners can exchange their experiences of contact centres. Tutors can take feedback on a flipchart or board to share the discussions of individual groups.

Learners should be encouraged to engage with employers and, where possible, other employees to gain knowledge and understanding of the selling process within a contact centre.

Knowledge of issues relating to sales activities and customer support in a contact centre environment gained through engaging with employers and employees, rather than through a purely theoretical context, is key. This should be made possible by learners working with others who have responsibilities for ensuring effective sales activities and customer service are in place within a contact centre, for example a team leader, where possible, and through the use of guest speakers and video/DVD training programmes.

For example, a presentation by a contact centre sales manager will support delivery, as well as adding vocational relevance and currency. The visiting speaker could deliver a summary of how sales activities are handled in their centre, how sales data is used and manipulated to inform sales plans and how sales teams are monitored and supported in achieving their sales targets. This should be supported by examples drawn from industry or through developed case studies that highlight the importance of complying with regulations, legalisation and service offers and of dealing with customer complaints correctly, and the possible consequences and impact of non-compliance and breaching service offers.

This unit could be delivered through distance learning. However, this will involve additional, and different, considerations, such as planning, and other measures to ensure learners can gain the required knowledge and understanding.

## Assessment

A variety of assessment methods could be used. Learners could produce written reports or give verbal presentations, supported by witness testimony. An alternative could be logbooks or workbooks completed in the workplace or during visits.

Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of the assessment criteria.

## Indicative resource materials

### Textbooks

Bacal R – *Perfect Phrases for Customer Service* (McGraw Hill Professional, 2005)  
ISBN-10007144453X

Freemantle D – *The Buzz 50 Little Things That Make a Big Difference to Serve Your Customers* (Nicholas Bentley Publishing, 2004) ISBN 1857883470

Leland K and Bailey K – *Customer Service for Dummies* (John Wiley & Sons, 2006)  
ISBN-100471768693

### Magazines

*Call Centre Focus*

*Call Centre Helper*

*Customer First – Institute of Customer Service*

### Websites

Tutors may wish to develop a list of employer sites that will support learning in an appropriate context. Other websites address legislation and regulatory issues. The following may be useful:

<a href="http://www.callcentre.co.uk">www.callcentre.co.uk</a>	Call centre news and
<a href="http://www.contactcentreworld.com">www.contactcentreworld.com</a>	Contact Centre World
<a href="http://www.instituteofcustomerservice.com">www.instituteofcustomerservice.com</a>	Institute of Customer Service
<a href="http://www.legislation.gov.uk">www.legislation.gov.uk</a>	Official home of UK legislation
<a href="http://www.tradingstandards.gov.uk">www.tradingstandards.gov.uk</a>	Trading Standards Institute

## Further information and useful publications

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To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)
- books, software and online resources for UK schools and colleges: [www.pearsonschoolsandfecolleges.co.uk](http://www.pearsonschoolsandfecolleges.co.uk)

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

### **Additional resources**

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

# Professional development and training

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Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

## **BTEC training and support for the lifetime of the qualifications**

**Training and networks:** our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

**Regional support:** our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

To get in touch with our dedicated support teams please visit our website.

## **Your Pearson support team**

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- **Subject Advisors:** find out more about our subject advisor team – immediate, reliable support from a fellow subject expert
- **Ask the Expert:** submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

Please visit our website at [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)

## Annexe A

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### The Pearson/BTEC qualification framework for the contact centre sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
4				Pearson Edexcel Level 4 NVQ Diploma in Customer Service  Pearson Edexcel Level 4 NVQ Diploma in Contact Centre Operations
3			Pearson BTEC Level 3 Award in Customer Service  Pearson BTEC Level 3 Certificate in Customer Service  Pearson BTEC Level 3 Certificate in Contact Centre Operations	Pearson Edexcel Level 3 NVQ Diploma in Customer Service  Pearson Edexcel Level 3 NVQ Diploma in Contact Centre Operations  Pearson Edexcel Level 3 NVQ in Telesales

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
2			Pearson BTEC Level 2 Award in Customer Service Pearson BTEC Level 2 Certificate in Customer Service Pearson BTEC Level 2 Certificate in Contact Centre Operations	Pearson Edexcel Level 2 NVQ Certificate in Customer Service Pearson Edexcel Level 2 NVQ Certificate in Contact Centre Operations Pearson Edexcel Level 2 NVQ in Telesales
1			Pearson BTEC Level 1 Award in Customer Service	Pearson Edexcel Level 1 NVQ Certificate in Customer Service Pearson Edexcel Level 1 NVQ Certificate in Contact Centre Operations Pearson Edexcel Level 1 NVQ Award in Contact Centre Operations



# Annexe B

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## Wider curriculum mapping

Pearson BTEC Level 2 qualifications give learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

### **Spiritual, moral, ethical, social and cultural issues**

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

### **Citizenship**

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

### **Environmental issues**

Developing a responsible attitude towards the care of the environment is an integral part of these qualifications. Learners are encouraged to minimise waste and discuss controversial issues.

### **European developments**

Much of the content of these qualifications applies throughout Europe, even though the delivery is in a UK context.

### **Health and safety considerations**

Health and safety is embedded within many of the units in these qualifications. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

### **Equal opportunities issues**

There will be opportunities throughout these qualifications to explore different kinds of rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.



# Annexe C

## National Occupational Standards mapping

The grid below maps the knowledge covered in Pearson BTEC Level 2 Certificate in Contact Centre Operations against the underpinning knowledge of the National Occupational Standards for contact centres.

### KEY

3 indicates partial coverage of the NOS

a blank space indicates no coverage of the underpinning knowledge

NOS	Unit:	201	202	203	204	205	206	207	208	304	305	306
Improve your personal effectiveness at work in a contact centre		3										
Seek opportunities to develop your own personal effectiveness at work in a contact centre		3										
Improve organisational effectiveness to establish strategy for personal development in a contact centre		3										
Comply with relevant health and safety procedures in a contact centre			3									
Monitor health and safety procedures in a contact centre			3									
Maintain and implement health and safety procedures in a contact centre			3									
Review and develop health and safety policy and procedures in a contact centre			3									
Use specific features of contact centre systems and technology					3					3		
Use systems and technology during customer contact in a contact centre					3	3				3		
Support team use of contact centre systems and technology					3					3		
Manage the use of contact centre systems and technology					3					3		

<b>NOS</b>	<b>Unit:</b>	<b>201</b>	<b>202</b>	<b>203</b>	<b>204</b>	<b>205</b>	<b>206</b>	<b>207</b>	<b>208</b>	<b>304</b>	<b>305</b>	<b>306</b>
Coordinate contact centre systems and technology					3					3		
Contribute to customer service in a contact centre						3					3	
Deliver customer service through a contact centre						3					3	
Oversee customer service activities in a contact centre agent team						3					3	
Manage customer service delivery in a contact centre						3					3	
Review and design customer service procedures for use in a contact centre						3					3	
Contribute to basic sales activities in a contact centre							3					3
Carry out direct sales activities in a contact centre							3					3
Lead direct sales activities in a contact centre team							3					3
Monitor and oversee direct sales activities in a contact centre							3					3
Organise and manage direct sales activities in a contact centre							3					3
Communicate simple information in customer contact through a contact centre						3						3
Communicate information to customers in different but familiar contexts through a contact centre						3						3
Communicate complex information to customers through a contact centre						3						3
Coordinate customer communication processes in a contact centre		3		3								3
Contribute to performance management in a contact centre		3		3								
Manage team and individual performance in contact centre operations		3		3								

<b>NOS</b>	<b>Unit:</b>	<b>201</b>	<b>202</b>	<b>203</b>	<b>204</b>	<b>205</b>	<b>206</b>	<b>207</b>	<b>208</b>	<b>304</b>	<b>305</b>	<b>306</b>
Develop and enhance performance management in a contact centre		3		3								
Provide basic support through a contact centre for specified services and/or products						3						3
Provide support through a contact centre for specified services and/or products						3						3
Support customers and colleagues when providing contact centre services				3		3						3
Review and maintain customer support operations in a contact centre												3
Manage the provision of customer support through a contact centre				3								3
Contribute to resource plan development in contact centre operations												
Manage resource planning and improvement of resource allocation in a contact centre												
Coordinate resource planning strategy in a contact centre												
Handle incidents under direction in a contact centre							3					
Manage incidents referred to a contact centre							3					
Manage Incident Management Systems in a contact centre							3					
Coordinate and develop strategy for incident management by a contact centre							3					



# Annexe D

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## Functional Skills Mapping

### Mapping to Level 1 Functional Skills

Level 1	Unit number							
English – Speaking, Listening and Communication	201	202	203	204	205	206	207	208
Take full part in formal and informal discussions and exchanges that include unfamiliar subjects					3			
English – Reading								
Read and understand a range of straightforward texts								
English – Writing								
Write a range of texts to communicate information, ideas and opinions, using formats and styles suitable for their purpose and audience					3			

Level 1	Unit number							
Mathematics – representing	201	202	203	204	205	206	207	208
Understand practical problems in familiar and unfamiliar contexts and situations, some of which are non-routine								
Identify and obtain necessary information to tackle the problem				3			3	
Select mathematics in an organised way to find solutions								

Level 1	Unit number							
<b>Mathematics – analysing</b>	<b>201</b>	<b>202</b>	<b>203</b>	<b>204</b>	<b>205</b>	<b>206</b>	<b>207</b>	<b>208</b>
Apply mathematics in an organised way to find solutions to straightforward practical problems for different purposes								
Use appropriate checking procedures at each stage								
<b>Mathematics – interpreting</b>								
Interpret and communicate solutions to practical problems, drawing simple conclusions and giving explanations								

### Mapping to Level 2 Functional Skills

Level 2	Unit number		
<b>English – Speaking, Listening and Communication</b>	<b>304</b>	<b>305</b>	<b>306</b>
Make a range of contributions to discussions in a range of contexts, including those that are unfamiliar, and make effective presentations			
<b>English – Reading</b>			
Select, read, understand and compare texts and use them to gather information, ideas, arguments and opinions			
<b>English – Writing</b>			
Write a range of texts, including extended written documents, communicating information, ideas and opinions, effectively and persuasively			



Level 2	Unit number		
<b>Mathematics – representing:</b>	<b>304</b>	<b>305</b>	<b>306</b>
Understand routine and non-routine problems in familiar and unfamiliar contexts and situations	3		
Identify the situation or problems and identify the mathematical methods needed to solve them			
Choose from a range of mathematics to find solutions			
<b>Mathematics – analysing</b>			
Apply a range of mathematics to find solutions			
Use appropriate checking procedures and evaluate their effectiveness at each stage	3		
<b>Mathematics – interpreting</b>			
Interpret and communicate solutions to multistage practical problems in familiar and unfamiliar contexts and situations			
Draw conclusions and provide mathematical justifications			



# Annexe E

## Unit mapping overview

Pearson BTEC Level 2 Award in Contact Centre Skills legacy technical certificate/new version of the BTEC Level 2 Certificate in Contact Centre Operations

Level 2			
Old units \ New units	Unit 1	Unit 2	Unit 3
Unit 1		P	P
Unit 2	P		
Unit 3			
Unit 4	P		
Unit 5			
Unit 6	P	P	
Unit 7			P
Unit 8	P		

Level 3			
Old units \ New units	Unit 1	Unit 2	Unit 3
Unit 1	P		
Unit 2			P
Unit 3			
Unit 4			
Unit 5			
Unit 6			
Unit 7		P	
Unit 8			
Unit 9		P	

### KEY

- P – Partial mapping (some topics from the old unit appear in the new unit)
- F – Full mapping (topics in old unit match new unit exactly or almost exactly)
- X – Full mapping + new (all the topics from the old unit appear in the new unit, but new unit also contains new topic(s))



# Annexe F

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## Glossary of accreditation terminology

<b>Accreditation start and end date</b>	The first and last dates that Pearson can register learners for a qualification.
<b>Certification end date</b>	The last date on which a certificate may be issued by Pearson.
<b>Credit value</b>	All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.
<b>Guided Learning Hours (GLH)</b>	Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.
<b>Learning Aims Reference Application Database</b>	Link to the Learning Aims Reference Application Database, which features detailed funding information by specific learning aim reference.
<b>Learning Aim Reference</b>	Unique reference number given to the qualification by the funding authorities on accreditation.
<b>Level</b>	All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.
<b>Performance tables</b>	This qualification is listed on the Department for Education (DfE) website School and College Achievement and Attainment Tables (SCAAT) as performance indicators for schools and colleges.
<b>Qualification Number (QN)</b>	Unique reference number given to the qualification by the regulatory authorities on accreditation.
<b>Register of Regulated Qualifications</b>	Link to the entry on the Register of Regulated Qualifications for a particular qualification. This database features detailed accreditation information for the particular qualification.

<b>Section 96</b>	Section 96 is a section of the Learning and Skills Act 2000. This shows for which age ranges the qualification is publicly funded for under-19 learners.
<b>Title</b>	The accredited title of the qualification.
<b>UCAS points</b>	This qualification is listed on the Universities and Colleges Admissions Service (UCAS) tariff for those wishing to progress to higher education.

## Annexe G

### BTEC Specialist and Professional qualifications

BTEC qualifications on the NQF	Level	BTEC Specialist and Professional Qualifications	BTEC qualification suites
<b>BTEC Level 7 Advanced Professional qualifications</b> BTEC Advanced Professional Award, Certificate and Diploma	7	<b>BTEC Level 7 Professional qualifications</b> BTEC Level 7 Award, Certificate, Extended Certificate and Diploma	
<b>BTEC Level 6 Professional qualifications</b> BTEC Professional Award, Certificate and Diploma	6	<b>BTEC Level 6 Professional qualifications</b> BTEC Level 6 Award, Certificate, Extended Certificate and Diploma	
<b>BTEC Level 5 Professional qualifications</b> BTEC Professional Award, Certificate and Diploma	5	<b>BTEC Level 5 Professional qualifications</b> BTEC Level 5 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 5 Higher Nationals</b> BTEC Level 5 HND Diploma
<b>BTEC Level 4 Professional Qualifications</b> BTEC Professional Award, Certificate and Diploma	4	<b>BTEC Level 4 Professional qualifications</b> BTEC Level 4 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 4 Higher Nationals</b> BTEC Level 4 HNC Diploma
<b>BTEC Level 3 qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	3	<b>BTEC Level 3 Specialist qualifications</b> BTEC Level 3 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 3 Nationals</b> BTEC Level 3 Certificate, Subsidiary Diploma, Diploma and Extended Diploma

<b>BTEC qualifications on the NQF</b>	<b>Level</b>	<b>BTEC Specialist and Professional Qualifications</b>	<b>BTEC qualification suites</b>
<b>BTEC Level 2 qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>2</b>	<b>BTEC Level 2 Specialist qualifications</b> BTEC Level 2 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 2 Firsts</b> BTEC Level 2 Certificate, Extended Certificate and Diploma
<b>BTEC Level 1 qualifications</b> BTEC Award, Certificate, Extended Certificate and Diploma	<b>1</b>	<b>BTEC Level 1 Specialist qualifications</b> BTEC Level 1 Award, Certificate, Extended Certificate and Diploma	<b>BTEC Level 1 Qualifications</b> BTEC Level 1 Award, Certificate and Diploma (vocational component of Foundation Learning)
	<b>E</b>	<b>BTEC Entry Level Specialist qualifications</b> BTEC Entry Level Award, Certificate, Extended Certificate and Diploma	<b>BTEC Entry Level Qualifications (E3)</b> BTEC Entry Level 3 Award, Certificate and Diploma (vocational component of Foundation Learning)

**NQF** = National Qualifications Framework

For most qualifications on the **NQF**, the accreditation end date is normally 31 August 2010 or 31 December 2010.

<b>Qualification sizes</b>	
<b>Award</b>	1-12 credits
<b>Certificate</b>	13-36 credits
<b>Diploma</b>	37+ credits



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