Level 3 Certificate in Contact Centre Supervisory Skills

International Qualifications from EDI

Syllabus

Effective from June 2008

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INTRODUCTION

EDI is a leading international awarding body that was formed through the merger of the London Chamber of Commerce and Industry Examinations Board (LCCI) and GOAL, a leading online assessment provider. EDI now delivers LCCI International qualifications (LCCI IQ) through a network of over 5000 registered centres in more than 120 countries worldwide. Our range of business-related qualifications is trusted and valued by employers worldwide and recognised by universities and professional bodies.

Level 3 Certificate in Contact Centre Supervisory Skills

Aims

The aims of this qualification are to enable candidates to develop:

- an in-depth knowledge and understanding of the principles, techniques and practices necessary for effective team leadership and team development

- an understanding of the principles and techniques necessary for planning and managing staff, resources and operations effectively

- knowledge and understanding of the advanced principles and techniques used in developing and delivering excellent customer service

- the necessary skills, techniques and knowledge to enable them to handle effectively non-routine and complex customer calls autonomously.

Target Audience and Candidate Progression

This qualification is suitable for those who already have the knowledge, understanding and skills needed to work competently in a Contact Centre call handling role, and now wish to progress to a supervisory or senior role where they will be expected to lead a team and handle non-routine and complex customer calls autonomously.

Additionally, Unit 2, as a qualification in its own right, is suitable for people who may not be working in a Contact Centre but are working at a senior level, or intending to work at such a level, where they have to resolve customer problems and complaints autonomously.

There are no formal requirements or recommended prior learning; however, due to the technology based nature of the qualification, candidates may find it beneficial to have completed units such as Email, Internet and IT Security and Database or Spreadsheets from the LCCI Level 2 or 3 Certificate in Practical ICT Skills qualifications.

Level of English required

Candidates should also have a standard of English to enable them communicate effectively in a business context. The level of English required should be equivalent to LCCI IQ Level 3 English for Business (CEF B1/B2).

Structure of the Qualification

The LCCI Level 3 Certificate in Contact Centre Supervisory Skills is based on the current UK National Occupational Standards (NOS) for Contact Centres. The qualification will be awarded to candidates who successfully complete the learning outcomes and assessments for both of the following units:

Unit 1 Leading and Managing People and Resources
Unit 2 Handling Non-Routine and Complex Calls

Certification is also available at unit level as each unit is regarded as a worthwhile achievement in its own right.

Syllabus Topics

Unit 1: Leading and Managing People and Resources

1 Leading and Developing Contact Centre Teams

2 Staff Resource Planning and People Management

3 Managing the Delivery of Excellent Customer Service

4 Managing Operations and Contact Centre Technologies

Unit 2: Handling Non-Routine and Complex Calls

1 Handling Incoming Calls for Non-Routine Customer Problems/Requests

2 Handling Inbound Sales Calls for Complex or Multiple Products/Services

3 Making Outbound Sales or Service Calls for Complex or Multiple Products/Services

4 Call Handling Techniques

5 Dealing with Challenging Service Situations

6 Actions Associated with Call Handling

7 Follow-up Actions to Call Handling

Guided Learning Hours

EDI recommends that approximately 80 - 120 Guided Learning Hours (GLHs) provide a suitable course duration for an 'average' candidate at this level.

Guided Learning Hours include direct contact hours as well as other time when candidates' work is being supervised by teachers. Ultimately, however, it is the responsibility of training Centres to determine the appropriate course duration based on their candidates' ability and level of existing knowledge. EDI experience indicates that the number of GLHs can vary significantly from one training centre to another.

ASSESSMENT

Assessment of the qualification is by a combination of a multiple-choice test and practical call handling assignments as summarised in the following table:

	Unit	Method of assessment	Format
Unit 1	Leading and Managing People and Resources	Multiple-choice test	40 questions to be completed in 1 hour
Unit 2	Handling Non-Routine and Complex Calls	Practical Call Handling Assignments	6 assignments from a total of 8 to be completed in 1 hour 30 minutes

Both assessments are available On Demand

Assessment Objectives

The multiple-choice test will assess the candidate's ability to:

- outline and explain the principles, concepts and practices used in leading, developing and managing a team effectively
- describe and explain the principles, practices and techniques used in staff resource planning, recruitment and retention of staff and performance management
- explain advanced customer service principles and practices and how they are used to develop and deliver customer service that exceeds customer expectations
- outline the principles of operations management; including operational planning, monitoring quality and compliance, ensuring workplace health and safety and operating systems and technology.

The practical call handling assignments will assess the candidate's ability to:

- handle incoming calls for non-routine customer problems/requests, dealing effectively with challenging situations where necessary
- handle inbound sales calls for complex or multiple products/services and perform up selling and cross selling where opportunities exists
- undertake complex outgoing sales or service calls and sales lead generation activities
- undertake activities associated with call handling including the use of electronic communications and computer applications to manage and support customer interactions.

Coverage of Syllabus Topics in Examinations

Unit 1 - The multiple-choice test will cover the topics within the unit as follows:

Leading and Managing People and Resources	
Topics	**Approximate weighting**
Leading and Developing Contact Centre Teams	35%
Staff Resource Planning and People Management	23%
Managing the Delivery of Excellent Customer Service	17%
Managing Operations and Contact Centre Technologies	25%

Unit 2 - All the syllabus topics will be covered in the practical call handling assignments provided by EDI. Each assignment assesses three syllabus topics; however, candidates will be assessed on all syllabus topics across the six assignments

Answer Format

Candidates must complete the Unit 1 multiple-choice test and the Unit 2 practical call handling assignments in order to be eligible for the full award.

Unit 1 - for each of the 40 multiple-choice questions candidates must mark A, B, C or D on the Candidate Answer Sheet.

Unit 2 - for each of the 6 practical call handling assignments (selected from 8 available) candidates must handle a telephone call, incoming or outgoing, as directed by the Centre Assessor. For some assignments, candidates will also be required to enquire of, or input data to, the computer, produce print outs and fill in forms.

Mark Allocation and Grading

Unit 1 - Multiple-Choice Test

Unit 1 is graded Pass, Merit or Distinction according to the mark achieved in the multiple-choice test. After completion, the tests are sent to EDI for marking. EDI rigorously edits all multiple-choice items and test papers to ensure their quality and consistency. EDI will publish pass marks for multiple-choice question papers once the necessary statistical data has been compiled and validated. This will usually be one year after the launch of the qualification.

Unit 2 - Practical Call Handling Assignments

Unit 2 is graded Pass, Merit or Distinction according to the total marks achieved across the six assignments:

Pass	50%	(Total marks for 6 completed assignments is between 36 and 43)
Merit	60%	(Total marks for 6 completed assignments is between 44 and 53)
Distinction	75%	(Total marks for 6 completed assignments is between 54 and 72)

Candidates must score a minimum of 6 marks in each call handling assignment. Where a candidate scores less than 6 in any assignment, he/she may re-take that assignment

Assessment Guidance

The assessment environment for the candidates must provide the appropriate conditions for a secure assessment to be undertaken. Candidates must only have access to their own work and all timings must be strictly observed, with necessary supervision at all times. All multiple-choice tests must be carried out in accordance with the *EDI Rules for the Conduct of External Assessments – Multiple-Choice Tests,* which is sent to centres with the exam papers.

Unit 2 practical call handling assignments are administered and marked by the Centre and moderated by EDI. For each 'sitting' centres will be sent:

- Level 3 Practical Call Handling Assignments – Handling Non-Routine and Complex Calls
- Level 3 Candidate Guidance for Practical Assignments
- Level 3 Assignment Marking Criteria
- Level 3 Candidate Mark Sheet

Centres will tape record each candidate's telephone call for each call handling assignment. Completed assignments will be marked by the Centre using the Assignment Marking Criteria supplied by EDI. The tapes, assignment documentation (e.g. database printouts) and the completed candidates' mark sheets should then be forwarded to EDI.

EDI will then moderate the centre's marking using the tapes, assignment documentation and mark sheets received. Moderation may lead to an adjustment to the final result. The authenticity of the assignments will be confirmed at moderation and EDI reserves the right to reject candidates' submissions if the qualifications regulations of the qualifications have been infringed.

These assignments are generic and centres will customise them to meet their own company and database requirements.

Please refer to the Centre Support Pack for the qualification for detailed information on the equipment and resources required for delivery and assessment and for guidance on the marking and the administration of the assessments.

Certification

A full Certificate for Level 2 Contact Centre Skills is awarded to those candidates who achieve a Pass, Merit or Distinction in both Unit 1 and Unit 2.

A Unit Certificate for Level 2 Contact Centre Skills is awarded to those candidates who achieve a Pass, Merit or Distinction in either Unit 1 or Unit 2.

The Centre will receive certificates within a maximum of 6 weeks of the receipt of the answer sheets and assignments at EDI.

Recommended Reading List and Support Material

Reading List

Title	Authors(s)	Publisher	ISBN Code
Gower Handbook of Call and Contact Centre Management	Natalie Calvert	Gower Publishing Ltd	978-0566085109
Team and Personal Development	David James	Global Professional Publishing	978-0852975251
Calming Upset Customers	Rebecca Morgan	Crisp Publications	978-1560526698

Support Material

A Centre Support Pack, which gives further guidance on delivering the qualification, is available on the qualification page of the website: www.lcci.org.uk . It provides complete guidance on the administration and marking of the practical call handling assignments as well as useful website links which may provide valuable information and guidance to support teaching and learning.

Sample multiple-choice questions and a sample call assignment are also available on the qualification page of the website.

Additionally, to support the delivery of the new syllabus, a zip folder containing Teaching and Learning Resources is available on the qualification page of the website. Resources include definitions and meanings of key new concepts and terminology in Unit 1 as well as guidance and information for the practical aspects in Unit 2. As the folder contains resources for both Levels 2 and 3, each document is labelled with the level for which it is most appropriate. Centres can download these to use as learning handouts for students or as a teaching resource. Where necessary, teachers will need to expand on the information presented to meet the specific objectives of the syllabus.

Centres will also find useful teaching and learning resources in Sections B and C of the Level 2 Certificate in Employability Skills Tutor Support Pack, which is available on the website. Information and resources in these sections can be used in delivering some topics in Unit 1 of the qualification

How to Offer this Qualification

To offer this qualification you must be an LCCI IQ registered examination centre. To gain centre approval please contact Customer Support on 08700 818008 between the hours of 0830 and 1700 (GMT) Monday to Friday or by email on centresupport@ediplc.com

Alternatively you may contact your Regional LCCI Office or Co-ordinating Authority.

Centre's must also meet certain equipment and resource requirements in order to offer the assessments; please see the Centre Support Pack for the qualifications for these specific requirements

Unit 1 Leading and Managing People and Resources

Syllabus Topic	Items Covered
1. Leading and Developing Contact Centre teams	Candidates must be able to:
1.1 Effective team leadership	1.1.1 Outline the principles of effective leadership: e.g. ▪ planning ▪ directing ▪ delegating ▪ supporting people development ▪ open communications ▪ decision-making ▪ team working, etc.
	1.1.2 Identify the characteristics/traits of a good leader and explain why each is necessary for effective leadership; e.g. ▪ honesty ▪ occupational competence ▪ forward-looking ▪ inspiring ▪ fair-minded and broad-minded ▪ imaginative ▪ influential, etc.
	1.1.3 Distinguish between the different leadership styles and identify situations in which each would be most appropriate e.g. ▪ visionary ▪ coaching ▪ participative/democratic ▪ authoritarian/authoritative, etc.
	1.1.4 Explain what it means to 'empower' people and explain how this impacts on team leadership and performance.
	1.1.5 Outline strategies that can be used to make team leadership more effective, e.g. ▪ goal setting ▪ engendering trust ▪ example setting ▪ reflexivity ▪ promoting morale ▪ leading within the team, etc.

1.2. Team building and team working

1.2.1 Describe the four stages of team development (forming, storming, norming, performing) and explain how these contribute to team cohesion.

1.2.2 Identify barriers to team development and describe how these may be overcome, e.g. of barriers:

- dominating team member
- fault-finding
- blame culture
- rejection of team ideas
- resistance to change, etc.

1.2.3 Outline strategies that can be used to encourage and support effective team working, e.g.

- considering team dynamics when assigning individuals to team roles
- establishing clear working practices and ground rules with team
- considering professional development needs of staff when assigning roles
- promoting an environment of openness and support among team members

1.2.4 Explain how positive working relationships impact on team working and team performance and outline the team leader's role in relationship building, e.g.

- supporting
- harmonising
- developing
- empathising
- dealing with conflict
- sharing information
- consulting, etc.

1.2.5 Explain how discrimination affects team behaviour and attitudes and identify ways in which it may be dealt with;

- recognising the legal obligations
- implementing and communicating policies and procedures to staff
- promoting and maintaining an atmosphere of acceptance among colleagues
- encouraging respect and co-operation across different background and cultures

1.2.6 Identify the causes and symptoms of team conflict; e.g. causes:

- personal problems
- personality conflicts
- cultural diversity
- poor communications
- lack of support,
- lack of clarity in purpose and team roles

Symptoms include:

- absenteeism
- gossip
- passive/aggressive behaviour
- hostility
- complaining
- not completing work on time, etc.

1.2.7 Explain how conflicts within a team can be managed and resolved, e.g.

- acting as a mediator
- identifying the causes, gather and analyse facts in order to decide on and implement the best solution
- refining solution where necessary
- reconciliation
- negotiation

1.3 Developing people

1.3.1 Outline methods of identifying the learning and development needs of team members, e.g.

- performance appraisal
- questionnaires and interviews
- individual self-assessment
- observation
- reviewing performance records
- future organisational requirements
- recommendations from team

1.3.2 Distinguish between coaching and mentoring and explain how both can be used to successfully develop people

1.3.3 Outline the recognised principles in developing a coaching programme, including:

- agree on skills to be developed
- decide on type of monitoring (side by side, remote, live) depending on experience/skills of employee
- monitor and provide corrective/ constructive feedback as soon as possible

- use skilful questioning to engage the employee’s understanding of their strengths and weaknesses and focus areas

1.3.4 Identify the key skills a coach needs to be effective e.g.

- effective goal setting
- problem solving
- ability to read non-verbal communications
- active listening
- empathising
- skilful questioning
- giving feedback positively
- checking
- facilitating, etc.

1.3.5 Distinguish between constructive and non-constructive feedback and identify guidelines for giving feedback positively.

1.3.6 Explain how giving constructive feedback can impact on team relationships and communications

1.3.7 Explain the purpose of group facilitation in the working environment and outline the role of the facilitator; e.g.

- giving direction
- providing structure and focus
- elaborating
- urging and enforcing, etc.

1.3.8 Identify techniques that the facilitator can use to manage difficult participants effectively; e.g.

- acknowledging unproductive behaviours and pointless arguments
- intervening where appropriate
- use of humour to relieve tension
- reminding group of rules of participation

1.4 Communicating effectively

1.4.1 Outline the challenges that may be encountered in interpersonal communications and explain how these may be resolved; e.g. challenges

- barriers to listening
- poor listening skills
- non-verbal communications
- cultural differences
- differences in attitudes and experiences

- differences in audience learning styles

1.4.2 Explain how the concept of Transactional Analysis can help in understanding behaviour and in improving the quality and effectiveness of communications

1.4.3 Explain why it is important to adapt communication style to meet audience needs and identify ways of doing this; e.g.

- varying voice tone (pitch, speed, volume, inflection)
- changing vocabulary/technical terminology accordingly
- using facial expressions, eye gaze, gestures and posture accordingly

1.4.4 Explain how 'mirroring' can be used to a create a rapport with others when communicating interpersonally

2. Staff Resource Planning and People Management

2.1 Staff resource planning

2.1.1 Explain the importance of staff resource planning and identify the different contact centre activities that will require staffing; e.g.

- call handling
- emails,
- faxes
- web chatting/instant messaging
- project work, etc.

2.1.2 Describe the different technology or tools that can be used to forecast staffing requirements e.g.

- Erlang calculator
- simulation
- historical data
- trends and patterns

2.1.3 Explain how the behaviours and characteristics of the workforce affect staffing levels, e.g.

- temporary/term time contracts
- new employees
- reliability,
- level of commitment, etc.

2.1.4 Identify factors/constraints that should be considered when developing staffing schedules, e.g.

- peaks and troughs

- staff capabilities and availability
- contingencies
- legal requirements
- staff activities and workload
- call blending etc.

2.2 Managing people and performance

2.2.1 Explain how the use of accurate role descriptions and well defined selection procedures help in the recruitment of suitable staff

2.2.2 Identify the common causes of workplace stress and outline strategies that can be used to minimise unnecessary stress and help staff cope with stress; strategies include:

- setting achievable performance targets for staff
- planning and scheduling staff appropriately
- implementing stress reducing initiatives and monitoring results
- helping others to identify stress and apply stress coping mechanisms as necessary

2.2.3 Identify factors which contribute to employee attrition in contact centres, e.g.

- stress
- heavy work load
- lack of progression/promotion
- routine/monotonous job
- lack of motivation
- low pay
- conflicts
- health issues, etc.

2.2.4 Explain the benefits of staff retention and outline strategies that may be used to improve staff retention e.g.

- financial incentives
- reward/recognition programmes
- career planning
- training
- recruitment techniques
- exit interviews, etc.

2.2.5 Identify the basic Key Performance Indicators (KPIs) that are used to measure performance in contact centres; e.g.

- FRR
- ASA,
- Abandon rate, etc.

(*list not exhaustive*)

2.2.5 Outline the recognised guidelines that should be used in setting performance targets:

- target setting based on SMART principles
- based on relevant (KPIs)
- benchmarked against industry standards
- related to corporate strategy and goals

2.2.6 Identify aspects of the customer interaction process that should be monitored and explain how the results are used in managing performance; e.g. aspects

- adherence to policies/regulations and script guidelines
- call standards/use of customer service procedures
- accuracy of systems transactions
- customer experience and satisfaction (listening, caring, helping, resolving etc)

2.2.7 Explain the role of appraisals in improving team performance and motivating staff

2.2.8 Identify the four key elements/stages of a good performance and appraisal system:

- agree and set targets
- manage performance
- conduct appraisal giving staff opportunity to comment on their performance
- provide rewards or remedies.

2.2.9 Outline best practice in conducting appraisals, including:

- giving staff adequate preparation time
- prepare by filling in appraisal forms before meeting
- being positive and constructive during meeting
- using appraisal form as a guide through the meeting
- agreeing further targets collaboratively and follow up by giving employee a copy of appraisal notes

2.2.10 Explain how real time statistics (station and queue statistics) can be used to enhance team performance

2.2.11 State the long-term benefits of a performance management system to an organisation, e.g.

- builds a performance oriented culture
- contributes to business improvement and change management
- contributes to a 'balanced scorecard' framework/approach
- supports reporting strategy

3. Managing the Delivery of Excellent Customer Service

3.1 Customer care

3.1.1 Explain what is meant by 'value-added service' and how a culture of valued added customer service can be encouraged in a team: e.g.

- learning and sharing best practice
- inspiring others to emulate effective methods and behaviours
- encouraging recommendations for customer service improvements
- developing in depth knowledge of customer base
- soliciting informal feedback to improve quality of service

3.1.2 Explain on what basis the content of a customer satisfaction survey is decided and identify possible content areas that could be covered in such surveys, e.g. content areas:

- quality of communications
- level of staff professionalism – courtesy and willingness to help
- level of satisfaction with the service
- staff commitment to problem resolution
- level of staff product/service knowledge
- quality of process or procedures

3.1.3 Describe how customer service metrics and data received from surveys can be used to improve customer satisfaction; e.g. of metrics:

- Average call length
- Average speed of answer (ASA)
- Abandon rate etc.

3.1.4 Distinguish between complaint management and complaint tracking and explain how both are important in ensuring customer satisfaction and customer retention

3.1.5 Outline the principles of, and the tools used in root cause analysis, and explain how it can help to eliminate reoccurring complaints/issues; tools include:

- brainstorming
- fish bone diagram, etc.

3.1.6 Identify ways of handling and resolving complex and high-risk complaints, e.g.

- listen, empathise, apologise and be patient
- take responsibility for the problem
- use probing questions to get facts
- research and investigate before making any decisions; give customer expected response time
- give customer choice of resolutions; negotiate equitable resolution for both
- follow up to make sure customer is satisfied

3.2 Customer acquisition and service delivery

3.2.1 Explain how having an in-depth understanding of complementary products and interacting services can help in making suggestions for product and service improvements.

3.2.2 Identify the different profiles that may be used for customer segmentation (*demographics, psychographics, value-based etc.*) and explain why it is important to review profiles against actual customer behaviour

3.2.3 Explain why it is important to adjust selling style and manner to suit customer needs and outline how this may be done; e.g.

- using good questioning techniques to understand customers' needs
- reading customers' non verbal communications (e.g. voice tone), etc.

3.2.4 Explain the importance of up selling and cross selling to meet business objectives

- **Managing Operations and Contact Centre Technologies**

4.1 Operational planning and management

4.1.1 Explain how corporate goals and values relate to operational plans and performance goals

4.1.2 Identify factors/issues to be considered in the formulation of new operational plans, e.g.

- availability, flexibility and productivity of resources
- industry constraints
- competitor and industry performance trends and norms
- risk analysis
- stakeholders input

4.1.3 Describe the role of the team leader in implementing operational plans, including:

- making implementation a group effort
- communicating plan to team members
- establishing mini-milestones
- coaching, where necessary
- monitoring progress

4.1.4 Explain the role of cost-benefit analysis in evaluating process improvements opportunities and their impact on customers.

4.1.5 Explain the reason for the change management process

4.1.6 Identify different ways of dealing with resistance to change

4.1.7 Outline the team leader's role in implementing change programmes, e.g.

- encouraging and coaching others to prepare for change
- communicating reasons and aims of change
- managing team members expectations of the impact of change
- documenting and tracking change
- managing resistance to change

4.1.8 Explain why having a Disaster Recovery Plan is important and identify ways of ensuring that team members are aware of recovery procedure

4.2 Quality assurance and compliance

4.2.1 Describe how adherence to quality standards are monitored and explain how this contributes to continuous improvements:

- call monitoring
- quality audits
- quality indicators

4.2.2 Identify legislations and regulations that impact on contact centre operations and describe how compliance adherence can be monitored; e.g. regulations:

- data protection legislation
- financial services regulations
- direct marketing regulations
- consumer protection laws

4.2.3 Outline factors to be considered when creating communication guidelines (scripts):

- relevant legislation
- organisational requirements
- flexibility to allow customisation
- features and benefits of products/services

4.3 Ensuring health and safety in the workplace

4.3.1 Identify health and safety requirements and regulations relevant to contact centres, e.g.

- work station minimal requirements
- display screen equipment testing
- regular breaks and physical and visual exercises
- emergency procedures
- noise levels, etc.

4.3.2 Explain how conducting Risk Assessments periodically can help in maintaining a safe and healthy working environment

4.3.3 Identify ways of ensuring that staff are aware of relevant health and safety hazards and practices in the workplace

4.4 Operating contact centre systems and technology

4.4.1 Identify the type of information that can be found on routine ACD and Dialler reports and explain how these reports can benefit the organisation

4.4.2 Describe the different configuration parameters (routing rules) and explain their effect on optimising organisational performance, e.g.

- universal queues
- skills based routing
- agent groups
- priorities
- call blending
- predictive call queuing
- KPIs such as predicted wait time, contact duration, agent occupancy etc

4.4.3 Describe the advanced features of a web telephony integrated system and explain how they help in providing streamlined web- based customer service, e.g.

- text chat
- VoIP applications
- white boarding applications
- collaborative web browsing applications

Unit 2 Handling Incoming Calls for Non Routine Customer Problems/ Requests

Syllabus Topic	Items Covered
1.1 Call Introduction	Candidates must be able to: 1.1.1 Pick up calls and use the most appropriate style of introduction, including: ▪ picking calls up within agreed timescale ▪ using a positive, concise and clear greeting accepted by organisations ▪ encouraging the continuation of the call by using an offer of help phrase ▪ responding to the customer's initial statement ▪ obtaining customer's name and relevant details ▪ verifying customer's identity in line with any legislation or data security procedures ▪ advising customer if call is being recorded, where necessary
1.2 Gathering Information on Customer Problems/Requests	1.2.1 Demonstrate an understanding of the information required about a customer's non-routine problem/request, including: ▪ the full details of the situation/issue ▪ the circumstances creating the customer's need

- the impact of these circumstances on the customer
- the customer’s perception of the problem/issue
- the customer’s preferred solution, if any

1.2.2 Gather information on customer’s non-routine problems/requests, including:

- using 'please' and 'thank you' when requesting and receiving information
- gathering all relevant and necessary information using appropriate questioning techniques probing for additional information where necessary
- exploring unclear statements until understood
- confirming or reading back information provided
- acknowledging the problem/request
- acknowledging the customer’s perception of the problem/issue
- confirming understanding of details
- confirming customer’s requirements
- meeting the level of service and quality required by organisations

1.3 Finding Solutions for Customer Problems/Requests

Candidates must be able to:

1.3.1 Follow the steps necessary to find a solution to a non-routine problem/requests, including:

- managing the customer’s expectations
- staying focussed on issues
- handling objections non-defensively
- identifying and verifying root causes of problems/issues
- explaining complex products/services in simple terms for customer
- providing accurate and comprehensive information and explanations in a clear and organised manner
- demonstrating knowledge of services and procedures
- effectively finding answers to unspoken questions
- tactfully correcting any misunderstandings where necessary
- complying with any relevant regulations or procedures
- explaining policy and procedure and the need for these where necessary

- offering options and alternatives that benefit both the customer and the organisation
- suggesting the best recommendation based on understanding of the customer's needs
- discussing how the suggested resolution best meets the customer's needs
- providing the customer with the opportunity of stating their preferred resolution before reaching agreement
- gaining customer's commitment to, and satisfaction with, agreed outcome
- meeting response resolution and resolution time objectives
- retaining customer goodwill by offering appropriate products, services, benefits or other gestures

1.3.2 Demonstrate the actions required when no solution can be found, including:

- keeping customer informed of actions and developments
- taking appropriate actions in line with company's agreed procedures i.e. follow escalation procedures

1.4 Call Closure

1.4.1 Demonstrate the use of the most appropriate style of closure, including:

- summarising agreed outcomes, actions and timescales
- providing confirmation information where necessary
- making a final offer of assistance
- soliciting informal feedback from customer to improve service delivery
- thanking customer for calling
- using a positive, concise and clear closure
- using words and standards
- accepted by organisations

2. Handling Inbound Sales Calls for Complex or Multiple Products/Services

Candidates must be able to:

2.1 Call Introduction

2.1.1 Pick up calls and use the most appropriate style of introduction, including:

- picking calls up within agreed timescale
- using a positive, concise and clear greeting accepted by organisations

- encouraging the continuation of the call by using an offer of help phrase
- responding to the customer's initial statement
- obtaining customer's name and relevant details
- verifying customer's identity in line with any legislation or data security procedures
- advising customer if call is being recorded, where necessary

2.2 Identifying and Developing Customer's Interest in Products/Services

2.2.1 Gather information to identify and develop customers' interest in complex or multiple products/services

- responding appropriately to customer's queries
- asking effective and appropriate probing questions to understand the underlying needs of the customer
- confirming and reading back information provided
- adjusting selling approach and style to customer
- explaining complex or multiple products/services in simple terms for customers
- comparing and contrasting how different products/services best fits customer needs
- translating product/service features into customer benefits and selling messages
- communicates key brand messages for each product/service to raise brand awareness
- anticipating and preventing customer objections
- responding persuasively to complicated customer objections
- identifying potential customer interest in similar products/services of a higher value (up selling)
- identifying potential customer interest in other related products/ services (cross selling)
- managing customer expectations
- maintaining control of the customer interaction
- complying with any relevant regulations or procedures
- explaining policy and procedures and the need for these where necessary
- using effective call handling technique

- providing best recommendation based on understanding of the customer's needs
- recognizing and effectively reacting to buying signals

2.3 Closing the Call / Sale

2.3.1 Demonstrate how the sale is closed, including:

- confirming customer requirements
- 'asking' for the sale
- reaching agreement about preferred products/services with customer
- performing cross selling or up selling where the opportunities exist
- explaining and agreeing sale or next stage with customer
- gaining customer's commitment to and satisfaction with the outcome
- generating new/ongoing sales lead

3. Making Outbound Sales or Service Calls for Complex or Multiple Products/Services

Candidates must be able to:

3.1 Call Preparation

3.1.1 Make preparations for selling, servicing or the generation of sales leads by telephone including:

- defining objectives for calls
- reviewing customer information
- having all relevant scripts, documents and materials ready
- preparing questions which will help achieve call objectives
- considering likely objections and questions and preparing responses which will assist in sales or service process

3.2 Identifying and Securing Customer Interest in the Sale

3.2.1 Demonstrate how to identify the customer's needs and evaluate their interest, including:

- making appropriate introduction according to organisation standards
- verifying customer's identity in line with any legislation or data security procedures
- checking with customer that it is convenient to talk now
- using a 'hook' to gain customer's attention
- asking effective and appropriate probing questions to understand the underlying needs of customer

- confirming and reading back information provided
- responding appropriately to customer queries
- evaluating customer’s buying needs and level of interest in complex products/services
- managing customer expectations
- staying focussed on the customer and the sale
- providing accurate and comprehensive information in a clear manner
- complying with relevant procedures and regulations
- explaining policy and procedures and the need for these where required
- offering options and alternatives to the customer
- anticipating and preventing customer objections
- responding persuasively to customer objections
- assessing customer’s view of competitor products/services and any agreements already made with competitors
- identifying likelihood of the sale based on customer reaction and proceed accordingly
- concluding the call positively where no interest is expressed

3.2.2 Effectively promote features and benefits of complex or multiple products during the telephone sales process, including:

- using effective call handling techniques
- matching benefits to identified customer needs
- discussing advantages and disadvantages of complex or multiple products/services
- explaining complex or multiple product/services in simple terms to customers
- encouraging customer to discuss and assess the features and benefits
- communicating key brand messages for each product/service to raise brand awareness
- recognising and effectively reacting to buying signals

3.3 Sales Service Follow-up

3.3.1 Effectively follow-up on the sales process to ensure customer satisfaction, including:

- thanking customer for purchasing from your organisation
- asking open questions to check that recommended product/service was suitable and effective
- checking to see if product/service was received when appropriate
- responding appropriately to any questions customer may have about the product/service or sales process
- explaining to the customer how they can get help or service in the future, if needed
- soliciting informal feedback from customer to improve service
- using key brand messages to reinforce why it was a good choice to buy from the organisation

3.4 Closing the Call / Sale	3.4.1 Demonstrate how the sale is closed, including: ▪ confirming customer requirements ▪ 'asking' for the sale ▪ reaching agreement about preferred products/services with customer ▪ explaining and agreeing next stage with customer i.e. agreed sale/referral or further sales contact ▪ gaining customer's commitment to and satisfaction with the outcome ▪ generating sales leads
4. Call Handling Techniques	Candidates must be able to:
4.1 Questioning Techniques	4.1.1 Correctly select and apply the different types of questioning techniques, including: ▪ open questions to gather information ▪ closed questions to control the customer interaction and obtain succinct responses ▪ probing questions to gather more detailed information ▪ hypothetical questions to check or test the customer's views or perceptions
4.2 Showing Interest and Sensitivity	4.2.1 Demonstrate the techniques to show sensitivity to, and interest in meeting, the customer's needs including: ▪ listening in an active/supportive/reflective manner ▪ catching customer's points first time ▪ acknowledging customer's points

- identifying, and effectively responding to, customer's points and feelings
- addressing the customer by name
- allowing the customer to speak without interrupting
- maintaining appropriate pitch, pace, tone, volume, clarity, energy, articulation and projection
- displaying willingness to help and maintaining professionalism
- mirroring and matching customer's style, manner and level of language and wording
- providing reassurance to customer through positive 'can do' attitude and language
- remaining calm and patient
- pausing to allow silence, where appropriate
- checking customer's understanding
- building trust and demonstrating empathy and rapport
- pursuing indications of dissatisfaction with customer
- taking responsibility for resolution of problem
- minimising and explaining delays e.g. during data entry, system response time or information retrieval
- explaining any need to put customer on hold and asking permission prior to holding
- limiting hold time to a maximum of 60 seconds before going back to customer
- checking if customer is prepared to continue to hold if longer than 60 seconds
- thanking customer for holding
- paraphrasing points to summarise and clarify
- keeping the call focused and optimise contact time

4.3 Overall Style of Communications

4.3.1 Adopt an overall style of handling the interaction which meets the needs of customers and the business, including:

- using simple language in communications and avoiding jargon
- avoiding hesitant and negative language
- using correct grammar and wording
- adhering to typical organisational call handling standards

- personalising communication guidelines as appropriate to ensure interaction seems natural
- maintaining a professional and friendly manner
- managing and adapting emotions to communicate calmly
- maintaining customer's participation and conversation flow
- meeting the level of service and quality required by organisations
- controlling the interaction to meet the customer's and organisation's objectives

4.3.2 Adapt call handling style to deal with the factors that influence customer types and expectations, including:

- speed of answer
- complexity of response/amount and depth of information provided
- duration of call
- range of solutions or products
- offered may be different for different customer types (customer segmentation)

5. Dealing with Challenging Service Situations	Candidates must be able to:
5.1 Customers with Special Communication Requirements	5.1.1 Adapt call handling style to meet the needs of customers with special communication requirements such as hearing, listening or language difficulties, including: ▪ speaking slowly and clearly ▪ speaking at a higher volume ▪ repeating the information as frequently as required ▪ agreeing to forward the information by email, fax or post
5.2 Difficult Customers	5.2.1 Demonstrate how to handle difficult customers effectively, including: ▪ allowing customers to vent their feelings while listening actively ▪ displaying patience and understanding with customers who are emotionally upset ▪ asking effective probing questions to identify the complaint/issue ▪ being assertive with customers who make unreasonable demands ▪ delivering difficult messages to customers and explaining the 'why' behind the action

- maintaining composure and consistent communication style throughout situations
- apologising for errors without placing blame
- putting the customer at ease as soon as possible
- maintaining a supportive and a ‘can do’ atmosphere
- assessing the priority of the issue
- negotiating with customer for a suitable resolution
- displaying excellent complaint handling behaviour
- terminating the call politely
- following up on customer problems

6. Actions Associated with Call Handling

Candidates must be able to:

6.1 Entering Information into a Computer System

6.1.1 Demonstrate how to enter all necessary information *(e.g. reason for call, caller’s details, agreed resolution, follow up actions required etc.*) into a computer whilst maintaining the dialogue with the customer, including:

- selecting the correct system
- obtaining all relevant details from customer
- verifying details are accurate
- entering and recording all necessary numerical and alphabetical data relating to calls and callers accurately in appropriate fields
- completing record of customer interaction and actions taken
- recognising and correcting errors in data input i.e. adding new data and modifying and cancelling existing data

6.2 Retrieving Information from a Computer System

6.2.1 Demonstrate how to retrieve information from a computer system whilst maintaining the dialogue with the customer, including:

- selecting the correct system
- navigating through sequence of events/screens/systems
- locating and retrieving numerical and alphabetical data accurately and within specified timescales
- using appropriate methods for searching and locating information

6.3 Call Handling Security

6.3.1 Demonstrate the good practices that organisations can take to ensure call and caller security during the interaction, including:

- adhering to relevant data protection legislation
- adhering to relevant guidelines on disclosure of recording and monitoring calls
- adhering to organisational procedures relating to data security and confidentiality e.g. identification of caller
- maintaining confidentiality in line with the caller's requirements

7. Follow-up Actions to Call Handling

Candidates must be able to:

7.1 Prepare Follow-up Actions

7.1.1 Prepare for follow-up actions on behalf of a customer after the call has been completed successfully, including:

- reviewing the customer's needs and follow-up requirements
- prioritising follow-up actions in line with customer's and organisation's needs
- updating computer system with details of follow-up actions

7.2 Sending and Receiving Electronic Communications

7.2.2 Demonstrate how to receive and send electronic messages (email, SMS, fax) including:

- checking for messages at regular intervals
- processing received messages in line with procedures
- saving messages in line with procedures
- composing and completing the message to meet customer's and organisational requirements and expectations
- communicating with the correct formality for medium
- selecting and sending to single or multiple recipients, as required
- using automated checking facilities to minimise errors in emails
- using automated responses when appropriate
- correctly attaching files, where necessary and appropriate
- transmitting message successfully and in line with procedures
- seeking support where transmission difficulties are experienced i.e. on-line help or following escalation procedures

- filing messages in line with procedures

7.3 Producing Information and Documentation	7.3.1	Demonstrate how to draft documentation to meet caller requirements following on from calls, including: ▪ correctly identifying the information requirements of callers ▪ gathering relevant information from computer systems, paper records or people ▪ determining the best way to provide information based on requirements and intended uses ▪ producing electronic and hard-copy word-processed documentation to meet requirements ▪ adhering to agreed standards and styles for document production ▪ meeting required standards of language, spelling, punctuation, grammar, length and clarity ▪ ensuring that all information contained within documentation is valid and accurate ▪ completing work within agreed timescales

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