

**Unit Title:** **Contribute to resource plan development in contact centre operations**

OCR unit number: 18  
 Sector unit number: CC35  
 Level: 3  
 Credit value: 7  
 Guided learning hours: 38  
 Unit reference number: L/503/0430

### Unit purpose and aim

This unit concerns being able to produce demand forecasts for contacts handled by contact centres, carry out scheduling and staffing activities and understand how to develop a resource plan for contact centre operations.

Learning Outcomes	Assessment Criteria	Teaching Content
<p><b>The Learner will:</b></p> <p>1 Be able to produce demand forecasts for contacts handled by contact centres</p>	<p><b>The Learner can:</b></p> <p>1.1 Identify the metrics that represent demand for contact centre services</p> <p>1.2 Identify resource needs for contact centre staff from an analysis of demand</p> <p>1.3 Predict demand for contact centre resources within agreed tolerances</p> <p>1.4 Explain the reasons for anticipated changes in demand for contact centre resources</p>	<p>This may include an understanding of:</p> <ul style="list-style-type: none"> <li>• The sector in which the organisation works.</li> <li>• The factors that affect supply and demand in the sector.</li> <li>• Analysis of previous work patterns.</li> </ul>
<p>2 Be able to carry out scheduling and staffing activities in a contact centre</p>	<p>2.1 Identify practicable options to address resource planning issues in consultation with colleagues</p> <p>2.2 Brief colleagues on demand trends and forecasts, resource availability and their implications for meeting organisational objectives</p> <p>2.3 Identify staff availability, preferences and constraints in context of business needs</p> <p>2.4 Plan the deployment of staff to meet business needs and changing requirements</p>	<p>This may include an understanding of:</p> <ul style="list-style-type: none"> <li>• The availability of extra staff and any training that would be required. The availability of current staff to do additional hours.</li> <li>• Any additional equipment/ work stations needed..</li> </ul>

Learning Outcomes	Assessment Criteria	Teaching Content
<p>3 Understand how to develop a resource plan for contact centre operations</p>	<p>3.1 Explain the impact of organisational requirement and regulation and legislation on contact centre operations</p> <p>3.2 Explain the organisational procedures and guidelines relating to resourcing contact centre operations</p> <p>3.3 Explain the importance of resource planning in the context of efficient contact centre operations</p> <p>3.4 Explain different techniques for monitoring and analysing resource needs in a contact centre</p> <p>3.5 Explain different techniques for predicting demand for contact centre resources</p> <p>3.6 Explain the importance of using confidence limits in demand forecasts in contact centres</p> <p>3.7 Explain how to use employee data and work records for resource planning purposes</p> <p>3.8 Explain the importance of considering staff availability, constraints and preferences when scheduling work</p> <p>3.9 Explain the importance of communication with colleagues about contact centre demand, resource availability and resource plans</p>	<p>This may include an understanding of:</p> <ul style="list-style-type: none"> <li>• Legislation and organisational regulations relating to the products or services of the contact centre.</li> <li>• The availability of records of previous planning and any subsequent reviews of the level of success attained.</li> <li>• The timescales involved so that planning is completed giving adequate time to arrange any additional resources and to communicate the plans to staff and review any feedback from them.</li> </ul>

## Assessment

This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which, on request, will need to be made available to the OCR external verifier. Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. An OCR Centre Authentication form is provided in the Centre Handbook.

## Evidence requirements

In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities.

You may collect evidence for the unit through work in a private sector organisation, a public sector organisation or a not-for-profit organisation.

You must provide evidence that shows you have done this over a sufficient period of time on different occasions for your assessor to be confident that you are competent.

You must provide evidence that you are able to monitor and forecast demand for customer support in a contact centre and plan and schedule the resources required to maintain provision.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Centre Handbook available from the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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Occupational Standards	Unit Number	Title
Contact Centre	35	Contribute to resource plan development in contact centre operations

## Functional Skills signposting

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This section indicates where candidates may have an opportunity to develop their functional skills

Functional Skills Standards				
English		Mathematics		ICT
Speaking and Listening		Representing		Use of ICT systems
Reading		Analysing		Find and select information
Writing		Interpreting		Develop, present and communicate information

## Resources

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Access to photocopier, PC and printer is desirable but not essential.

Access to sources of under-pinning knowledge such as websites, books, journals, etc, might be of help, but you are not expected to reproduce other people's written work.

## Additional information

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For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850).