

<b>Unit Title:</b>	<b>Develop customer service procedures for use in a contact centre</b>
OCR unit number	9
Sector unit number:	CC17
Level:	5
Credit value:	6
Guided learning hours:	12
Unit reference number:	A/503/0391

## Unit purpose and aim

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This unit concerns being able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre, develop procedures for customer service and understand the development of customer service procedures in contact centres.

Learning Outcomes	Assessment Criteria	Teaching Content
<b>The Learner will:</b> 1 Be able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre	<b>The Learner can:</b> 1.1 Assess the contribution of contact centre operations to the achievement of organisational business objectives 1.2 Develop the contact centre's service offer and its limits to meet organisational objectives 1.3 Use customer classification to define service standards in a contact centre that meet organisational objectives	The Learner may include: <ul style="list-style-type: none"> <li>• The overarching aims and objectives of the business</li> <li>• The function of the contact centre and its role in achieving business aims and objectives</li> <li>• The key measures that identify performance of the contact centre in relation to business objectives</li> <li>• The customer base and demographics associated with the business</li> <li>• The service offer required to compete effectively in the marketplace and achieve business objectives</li> <li>• Financial and other constraints on the content of the service offer</li> <li>• The service delivery standards required to achieve and maintain optimum levels of business</li> </ul>

Learning Outcomes	Assessment Criteria	Teaching Content
<p>2 Be able to develop procedures for customer service through a contact centre</p>	<p>2.1 Produce design options for customer service procedures that are consistent with agreed requirements and budgets</p> <p>2.2 Consult relevant people when developing different design options</p> <p>2.3 Ensure the design options conform with legal requirements and with any organisational strategy and policy for customer service</p> <p>2.4 Ensure design options take account of stakeholders' needs</p> <p>2.5 Confirm the fitness for purpose of proposed procedures and guidelines following a trial</p>	<ul style="list-style-type: none"> <li>Options for service delivery with cost/benefit analysis</li> <li>Company consultation procedures</li> <li>Records of consultation – eg reports, meetings</li> <li>Consultation with external agencies – e.g. taking legal advice – if required</li> <li>The legal obligations of the company – e.g. data protection; health &amp; safety; consumer rights; equality</li> <li>The regulatory requirements – e.g. codes of practice</li> <li>Company policy on customer service delivery</li> <li>How delivery options meet the needs of stakeholders – eg shareholders, directors, staff, others</li> <li>How to set up trials to evaluate options effectively</li> <li>The measures required to effectively compare different delivery models</li> <li>Analysis of data to support choice of options</li> </ul>
<p>3 Understand the development of customer service procedures in contact centres</p>	<p>3.1 Evaluate the impact of organisational and regulatory requirements on customer service delivery in the contact centre</p> <p>3.2 Explain the link between the organisation's customer service aims and objectives and the service offer(s) of the contact centre</p> <p>3.3 Explain how to define a service offer for a customer</p> <p>3.4 Explain how to trial draft customer service procedures and guidelines</p>	<ul style="list-style-type: none"> <li>The legal obligations of the company – eg data protection – and their impact on service delivery</li> <li>The regulatory requirements – eg codes of practice – and their impact on service delivery</li> <li>Company policy on customer service delivery and its impact on service delivery</li> <li>How the service offer matches customer service aims and objectives</li> <li>What a service offer should contain in addition to products and services – e.g. the way business is done; benefits to the customer of doing business with the company; the</li> </ul>

Learning Outcomes	Assessment Criteria	Teaching Content
		<p>aspects of delivery exceed that of competitors; defined levels of service that exceed customer expectation</p> <ul style="list-style-type: none"> <li>• How to set up trials to evaluate options effectively</li> <li>• The measures required to effectively compare different delivery models of delivery</li> </ul>

## Assessment

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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

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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 develop customer service procedures for use in a contact centre that help fulfil stated organisational aims and objectives.

## 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	17	Review and design customer service procedures for use in a contact centre

## 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).