

Contact Centre Operations

Contact Centre Operations Level 2 Certificate (10265)

Contact Centre Operations Level 3 Diploma (10268)

Contact Centre Operations Level 4 Diploma (10269)

OCR's qualifications in Contact Centre Operations have been developed in response to employer demand for up-to-date qualifications for this fast growing sector of the UK economy. They are flexible and meet the need for softer-skills such as communication, team working, interpersonal skills and the ability to improve own learning and performance, whilst also reflecting developments in communications technology such as telephones, emails, SMS, text messaging and other networking channels.

What is an NVQ?

An NVQ (National Vocational Qualification) is a qualification that assesses someone's competence (that is the skills, knowledge and understanding they have) within a work situation. NVQs are based on the national occupational standards that describe the level and breadth of performance expected of individuals whose work involves practices with in a contact centre. These NVQs are based on the national occupational standards developed by the Council for Administration (CfA). They are the government approved body who set the standards for the contact centre sector.

The awarding body for these NVQs is Oxford Cambridge and RSA Examinations (OCR) and the regulatory body is Ofqual, the statutory body for qualifications.

These qualifications have been accredited by Ofqual for inclusion on the Qualifications Credit Framework (QCF).

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Who are these NVQs for?

The OCR Level 2 NVQ Certificate in Contact Centre Operations is primarily aimed at candidates who undertake a contact centre role and recognises that employment in the contact centre sector involves a broad range of general and sector specific competencies. Job roles may include: Trainee Agent, Contact Centre Agent, Help Desk Operative, Sales Advisor, Customer Service Advisor, Telephone Banking Advisor and Telesales Operator.

The OCR Level 3 NVQ Diploma in Contact Centre Operations is aimed at candidates who will be delivering and managing service and will be accountable in the area of practice. Candidates will be working without direct supervision or on their own, with good interpersonal and influencing skills.

It is suitable for candidates working in job roles such as: Sales Team Leader, Contact Centre Team Leader, Supervisor and Contact Centre Manager.

The OCR Level 4 NVQ Diploma in Contact Centre Operations provides opportunities for further career progression to job roles such as Resource Scheduling Manager, Senior Planner, Team Manager, Key Account Manager, and Senior Contact Centre Manager.

These NVQs are work-orientated qualifications and are suitable for those who have current real work experience. They are open to candidates of any age and gender and there are no barriers to entry on the grounds of race, belief or previous academic attainment or learning.

What is their purpose?

The objective of these qualifications is to reflect the work of candidates who undertake contact centre activities at Levels 2, 3 or 4.

They provide a statement of competence that testifies to the ability of candidates to work to meet contact centre objectives. They cover support systems, processes and services and recognise that employment in contact centre operations involves a diverse range of functions, tasks and activities that are constantly developing in the light of changing technologies and customer needs.

These NVQs assess candidates' competence against the national occupational standards for Contact Centre Operations at Levels 2, 3 and 4. Candidates must prove they are competent in a wide range of activities.

What are the benefits of these NVQs?

Employees will benefit from:

- A clearer understanding of their responsibility within their organisation

- The opportunity to develop new skills
- The recognition of existing skills

Employers will benefit from:

- Improved staff performance and motivation
- Improvements in the quality of service to customers
- The opportunity to ensure levels of service are to national standard
- Improvements in the quality and service provided

What are the structures of these NVQs?

To achieve a full OCR Level 2 NVQ Certificate in Contact Centre Operations, candidates must achieve a total of 28 credits, of which 15 must be at Level 2: 6 credits from Group A; a minimum of 12 credits from Group B; a minimum of 10 credits from any remaining units from Groups B, C or D. Achievement of credit from no more than 2 units from Group D can count towards the full qualification.

Barred unit combinations (i.e. a candidate may take either, but not both):

- 10 & 18
- 32 & 34
- 33 & 35
- 36 & 37
- 38 & 39

NVQ units of competence

Group A - Mandatory Units

1. Improve personal effectiveness at work in a contact centre
2. Comply with health and safety procedures in a contact centre

Group B – Optional Units

3. Use systems and technology during customer contact in a contact centre
4. Deliver customer service through a contact centre
5. Carry out direct sales activities in a contact centre
6. Communicate information to customers in different but familiar contexts through a contact centre
7. Provide support through a contact centre for specified products and/or services
8. Deal with incidents through a contact centre
9. Support customers and colleagues when providing contact centre services

Group C

10. Deal with customers using bespoke software
11. Deal with incoming telephone calls from customers
12. Promote additional services or products to customers
13. Follow the rules to deliver customer service
14. Process customer service complaints
15. Work with others to improve customer service
16. Develop working relationships with colleagues
17. Word processing software
18. Bespoke software
19. Handling objections and closing sales
20. Time planning in sales
21. Selling by telephone - inbound
22. Selling by telephone - outbound
23. Inputting and accessing sales or marketing data in information systems
24. Maintain customer service through effective handover
25. Resolve customer service problems
26. Process information about customers
27. Deliver customer service to difficult customers
28. Buddy a colleague to develop their customer service skills
29. Develop your own customer service skills through self-study
30. Give customers a positive impression of yourself and your organisation
31. Support customers using on-line customer services

Group D

32. Using email
33. Using collaborative technologies
34. Using email
35. Using collaborative technologies
36. Using the internet
37. Using the internet
38. IT communication fundamentals
39. IT communication fundamentals

To achieve a full **OCR Level 3 NVQ Diploma in Contact Centre Operations**, candidates must achieve a total of 42 credits, of which 23 must be at Level 3, made up of: 6 credits from mandatory Group A; a minimum of 21 credits from optional Group B; the remaining 15 credits from optional Groups B or C.

Barred unit combination (i.e. a candidate may take either, but not both):

- Units 20 & 36

NVQ units of competence

Group A - Mandatory Units

1. Comply with health and safety procedures in a contact centre
2. Develop personal and organisational effectiveness in a contact centre

Group B – Optional Units

3. Monitor health and safety procedures in a contact centre
4. Support team use of contact centre systems and technology
5. Supervise customer service activities in a contact centre team
6. Manage customer service delivery in a contact centre
7. Carry out direct sales activities in a contact centre
8. Lead direct sales activities in a contact centre team
9. Manage direct sales activities in a contact centre
10. Communicate information to customers through a contact centre
11. Coordinate customer communication processes in a contact centre
12. Contribute to performance management in a contact centre
13. Support customers and colleagues when providing contact centre services
14. Maintain customer support operations in a contact centre
15. Contribute to resource plan development in contact centre operations
16. Deal with incidents through a contact centre
17. Manage incidents referred to a contact centre

Group C

18. Using Email
19. Using collaborative technologies
20. Bespoke software
21. Handling objections and closing sales
22. Leading a sales or marketing team
23. Negotiating, handling objections and closing sales
24. Contributing to the development and launch of new products and/or services
25. Set objectives and provide support for team members
26. Manage own professional development within an organisation
27. Support team members in identifying, developing and implementing new ideas
28. Plan, allocate and monitor work of a team
29. Manage customer service in own area of responsibility
30. Manage or support equality of opportunity, diversity and inclusion in own area of responsibility
31. Manage conflict in a team
32. Lead and manage meetings
33. Support customers using on-line customer services
34. Buddy a colleague to develop their customer service skills
35. Develop your own customer service skills through self-study
36. Deal with customers using bespoke software
37. Maintain customer service through effective handover
38. Organise the delivery of reliable customer service
39. Lead a team to improve customer service
40. Gather, analyse and interpret customer feedback
41. Monitor the quality of customer service transactions
42. Build a customer service knowledge set
43. Work with others to improve customer service
44. Process customer service complaints
45. Handle referred customer complaints
46. Champion customer service
47. Develop working relationships with colleagues
48. Using the Internet
49. IT Communication Fundamentals

To achieve a full **OCR Level 4 NVQ Diploma in Contact Centre Operations**, candidates must achieve 67 credits, of which 35 must be at Level 4, made up of: 7 credits from mandatory Group A; a minimum of 30 credits from optional Group B; a further 30 credits from optional Group C.

NVQ units of competence

Group A – Mandatory Units

1. Comply with health and safety procedures in a contact centre
2. Improve organisational effectiveness and personal development in a contact centre

Group B – Optional Units

3. Manage health and safety procedures in a contact centre
4. Develop health and safety policy and procedures in a contact centre
5. Manage the use of contact centre systems and technology
6. Develop strategy for contact centre systems and technology
7. Supervise customer service activities in a contact centre team
8. Manage customer service delivery in a contact centre
9. Develop customer service procedures for use in a contact centre
10. Manage direct sales activities in a contact centre
11. Manage direct sales operations in a contact centre
12. Coordinate customer communication processes in a contact centre
13. Contribute to performance management in a contact centre
14. Manage team and individual performance in contact centre operations
15. Develop and enhance performance management systems in a contact centre
16. Maintain customer support operations in a contact centre
17. Manage the provision of customer support through a contact centre
18. Contribute to resource plan development in contact centre operations
19. Manage resource planning and improvement of resource allocation in a contact centre
20. Coordinate resource planning strategy in a contact centre
21. Manage incident management systems in a contact centre
22. Develop strategy for incident management by a contact centre

Group C

23. Contributing to the development and launch of new products and/or services
24. Analyse the market in which your organisation operates
25. Prepare for and support quality audits
26. Develop, maintain and review personal networks
27. Develop and evaluate operational plans for own area of responsibility
28. Promote equality of opportunity, diversity and inclusion across an organisation
29. Examine staff turnover issues in own area of responsibility
30. Developing collaborative relationships with other organisations
31. Gather, analyse and interpret customer feedback
32. Review and re-engineer customer service processes
33. Champion customer service
34. Handle referred customer complaints
35. Implement quality improvements to customer service
36. Apply technology or other resources to improve customer service

Who is involved in the delivery of these NVQs?

Assessment centre

Any organisation, whether it is a place of employment, college or private training organisation can be approved to offer this qualification, as long as it meets the criteria set out in the OCR publication '*Administrative Guide to Verified Qualifications*' (reference code L526). This includes being able to provide suitably occupationally competent assessors and internal verifiers.

Once approved, an **assessment centre** will register candidates for the NVQ and allocate each candidate an **assessor** or **assessors**.

Trainer

The trainer will develop a candidate's knowledge, understanding and skills in relation to the NVQ that is being undertaken.

Trainers will:

- provide opportunities for learning
- provide ongoing mentoring to the candidate, including review and feedback on learning experiences and development of competence
- provide opportunities for a candidate to practice what they have learnt in their working environment or in a realistic working environment.

Assessor

The assessor will judge the evidence of a candidate's performance, knowledge and understanding against the units of competence in order to decide whether the candidate has demonstrated competence. The assessor will have suitable and reliable experience and be trained and qualified as an NVQ assessor. The criteria for appointing assessors are set out in the section **assessor and internal verifier requirements**. An assessor may be a candidate's line manager, a tutor at college, or someone specially appointed to this role. Assessments may also be carried out by a team of assessors.

The roles of trainer and assessor are inextricably linked and may be carried out by the same person, however, training activities must be clearly separated from assessment and only assessed evidence of competence should be presented as evidence towards the NVQ. The roles of assessor and trainer must be separate and preferably, where an individual has advised on a candidate's development they should not be that candidate's only assessor.

Internal verifier

Each assessor's work must be checked and confirmed by an **internal verifier** who is also a member of the staff of the assessment centre. The criteria for appointing internal verifiers are set out in the section **assessor and internal verifier requirements**. The internal verifier checks and standardises assessment decisions made by the assessors in the centre.

External verifier

The **external verifier** checks the assessment and internal verification decisions and processes made in the centre and authorises the claims for certificates. The external verifier is appointed by OCR.

How are these NVQs assessed?

Like all NVQs, these qualifications are **competence-based**. This means that they are linked to a person's ability to competently perform a range of tasks connected with their work.

To gain these NVQs a candidate must achieve the level of competence described in each unit. The units of assessment are based on the national occupational standards for Contact Centre Operations NVQ at Level 1.

What are the important assessment requirements for these NVQs?

Realistic working environment (RWE)

Assessment of the units within the OCR Level 1 NVQ Award in Contact Centre Operations may take place in the candidate's actual working environment or a realistic working environment (RWE). RWE is defined as a place that "*provides an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed*".

Assessment of the units within the OCR Level 1 NVQ Certificate in Contact Centre Operations must take place in the candidate's actual working environment.

Assessor and Internal Verifier Requirements

The following criteria have been developed by the Council for Administration and should be viewed as minimum requirements.

What to do next?

To seek approval to offer the qualification(s) please apply on-line following the step-by-step guide to applying for approval for vocational qualifications indicated on our 'Centre Approval' webpage.

Centres considering seeking approval to offer this qualification (or any other qualification we offer) might be interested to know that OCR staff are available to help with any aspect of setting up an assessment centre. Through an advisory telephone call or a centre visit we can assist, not only with the completion of the form, but also provide advice on the following areas:

- identifying potential candidates and marketing opportunities
- meeting OCR requirements

- identifying resourcing levels both in terms of staff and equipment
- the documents you might need for the benefit of the candidates and to ensure a smooth-running operation

For further information, please get in touch with our Customer Contact Centre by phone (**024 7685 1509**); email: vocational.qualifications@ocr.org.uk or in writing: OCR Customer Contact Centre, OCR, Westwood Way, Coventry, CV4 8JQ.

What other related OCR qualifications are available?

OCR Level 2 Certificate in Principles of Contact Centre Operations (10266)

OCR Level 3 Certificate in Principles of Contact Centre Operations (10267)

OCR also offers a range of qualifications in Business, Management, Administration and Retail which are relevant to NVQs in Contact Centre Operations. Please visit the OCR website: www.ocr.org.uk for details.

www.ocr.org.uk

OCR customer contact centre

Vocational qualifications

Telephone 024 76 851509

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