Unit Title:	**Principles of resource planning in a contact centre**
OCR unit number	11
Sector unit number:	CCTC12
Level:	3
Credit value:	5
Guided learning hours:	35
Unit reference number:	K/503/0399

Unit purpose and aim

This unit concerns understanding demand forecasting for contacts handled by contact centres and scheduling and staffing activities in a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content

The Learner will:
1 Understand demand forecasting for contacts handled by contact centres
	The Learner can:
	1.1 Describe the metrics that represent demand for contact centre services
		Candidates should have an understanding of:
		• metrics relating to historical data and past performance including
		  - contact volumes and types
		  - talk and handling times
		  - call waiting times
		  - abandon rates
		  - seasonal patterns and trends

	1.2 Explain how to analyse demand data to identify resource needs	• how to analyse may include the use of
		  - databases
		  - spreadsheets
		  - specialist systems

	1.3 Describe the acceptable tolerances for predicting demand	• the acceptable tolerances in line with the organisation's operations
	1.4 Explain the use of confidence limits in demand forecasting	• the use of confidence limits including the negative and positive effects on forecasting
	1.5 Explain the reasons for changes in anticipated demand	• the reasons for changes which may include - new products or services

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Learning Outcomes	Assessment Criteria	Teaching Content
		- changes to current products or services - marketing activity - seasonal fluctuations - operational demands

2 Understand scheduling and staffing activities in a contact centre	2.1 Explain the resource planning process	Candidates should have an understanding of:
		• the resource planning process including
		  - the operational objective such as activities and service levels
		  - skill sets required
		  - staff availability such as shifts, holidays, training, working preferences
		  - legal and contractual requirements
		  - budgetary constraints
		  - contingency

	2.2 Explain the options to address resource planning issues	• the options including
		  - altering skills set requirements
		  - negotiating changes to individual working preferences

	2.3 Explain the importance of briefing colleagues on trends, forecasts, resource availability	• the importance of briefing colleagues to ensure they understand their role and responsibilities as individuals and team members
	2.4 Explain the implications of trends, forecasts and resource availability for meeting organisational objectives	• the implications should include negative and positive impact

	2.5 Explain the importance of taking staff preferences and constraints into account in developing resource plans	• the importance including
		  - to retain a motivated team
		  - to reduce the likelihood of unplanned absences

	2.6 Explain the use of employee data and work records for resource planning purposes	• the data and records relating to
		  - skills set
		  - unscheduled absences
		  - holidays
		  - contracted working hours and shifts

Learning Outcomes	Assessment Criteria	Teaching Content
	2.7 Explain how to ensure that resource plans will meet business needs and changing requirements	• how to ensure plans meet needs and requirements by monitoring - individual attendance and punctuality - individual and team service level and performance - liaising with line managers and other departments on changes
	2.8 Explain the importance of involving colleagues in resourcing decisions	• the importance including - to share ideas on resource use i.e. swapping shifts, changing preferences - to retain a motivated team

Assessment

This unit is internally assessed by centre staff (e.g. teachers/tutors, support workers, carers, assessors) and externally verified by OCR.

Guidance on assessment and evidence requirements

Please refer to the OCR Centre Handbook available from the OCR website www.ocr.org.uk.

You should refer to the '*Admin Guide: Vocational Qualifications* (A850)' for *Notes on Preventing Computer-Assisted Malpractice*.

National Occupational Standards (NOS) mapping/signposting

Occupational standards	Unit number	Title
Contact centre	35	Contribute to resource plan development in contact centre operations

Functional skills signposting

Training provided for contact centre operations may help to prepare candidates for the functional skills assessment (e.g. report writing may be good preparation for English). It is likely however that further training would be needed to fully prepare candidates for functional skills assessment.

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

Resources

OCR evidence sheets have been produced to support candidates in producing appropriate evidence for these qualifications. Centres may choose to:

- tailor these for candidates

- use these as a benchmark for devising their own evidence sheets to aid candidates

Candidate evidence checklists can be found in the Contact Centre Operations section containing on the OCR website: http://www.ocr.org.uk.

Additional information

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