Unit Title: **Principles of customer service in a contact centre**

OCR unit number: 8

Sector unit number: CCTC9

Level: 3

Credit value: 4

Guided learning hours: 26

Unit reference number: F/503/0389

Unit purpose and aim

This unit concerns understanding customer service in a contact centre, how to resolve issues in customer service, how to monitor customer service performance and compliance and how to communicate verbally and in written or electronic form with customers referred by others in a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content
The Learner will: 1 Understand customer service in a contact centre	**The Learner can:** 1.1 Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported	Candidates should have an understanding of: • the purpose being to ensure the customers needs and expectations are met

	1.2 Explain how organisational and regulatory requirements affect the delivery of customer service	• the effect of organisational and regulatory requirements including
		  - Data Protection Act
		  - Financial Services Act
		  - Distance Selling Regulations
		  - consumer protection legislation
		  - PCI Data Standards Regulations

	1.3 Describe the importance of having customer service aims, objectives and service offers	• the importance including
		  - provide a standard for all employees to met when interacting with customer interactions
		  - to inform targets
		  - to measure targets
		  - to provide customers with a consistent service

Learning Outcomes	Assessment Criteria	Teaching Content
	1.4 Explain how to design Key Performance Indicators (KPIs)	• how to design KPIs including - identifying individual and team targets - identifying the metrics to be measured - deciding how metrics will be measured - tolerance levels - frequency of measurement - action to be taken following review of KPIs
2 Understand how to resolve issues in customer service in a contact centre	2.1 Explain how and why customer service issues are escalated	Candidates should have an understanding of: • why issues are escalated including - the limitations of own authority - requirement for specialist knowledge • how issues are escalated including - verbally i.e. face to face, telephone - written i.e. hard copy, electronic
	2.2 Explain how to validate customers' identity	• validation procedures including - organisational - regulatory
	2.3 Explain the techniques for establishing a rapport with customers	• techniques for establishing a rapport including - verbal e.g. tone, intonation, feedback, positive and negative language - non-verbal e.g. smiling while talking, body language, hearing and listening - empathy
	2.4 Explain how to balance the needs of the organisation with those of customers when resolving customer service issues	• how to balance needs when resolving issues including - identifying cost effective options for both parties - offering alternatives - resolving to the satisfaction of both parties - complying with regulatory requirements

Learning Outcomes	Assessment Criteria	Teaching Content
	2.5 Explain the importance of informing customers of what is happening and the reasons for any constraints or limitations	- the importance of keeping customers informed including - to meet their expectations - maintain the company image - reduce complaints - limitations and constraints e.g. to own authority, to balancing the needs of the organisation and the customer, financial, resources
3 Understand how to monitor customer service performance and compliance within a contact centre	3.1 Describe the scope of what needs to be monitored in customer service performance and compliance	Candidates should have an understanding of: - the scope including - adhering to the organisations customer service practices and procedures - compliance with regulatory requirements - compliance with codes of practice
	3.2 Explain the use of Key Performance Indicators (KPIs) in testing the quality of customer service delivery	the use of KPIs as the criteria for measuring service delivery
	3.3 Describe how to validate monitoring data	how to validate monitoring data will include the accuracy and suitability for the task
	3.4 Explain how to analyse monitoring data to identify areas for enhancement	how to analyse monitoring data through comparison to current performance indicators such as KPIs
	3.5 Describe who needs to be informed of monitoring results and why	- who to inform of results and why including - colleagues and teams - recognise good performance - address poor performance - identify development needs - line managers - inform performance reviews / appraisals - inform review of business targets

Learning Outcomes	Assessment Criteria	Teaching Content
4 Understand how to communicate verbally and in written or electronic form with customers referred by others in a contact centre	4.1 Explain the need for procedures and guidelines for verbal and written communications	Candidates should have an understanding of: • the need for procedures and guidelines including - consistency of service - to meet organisational requirements - to meet regulatory requirements
	4.2 Explain how to adapt the use of language to meet customers' needs	• how to adapt language including - verbal e.g. tone, intonation, feedback, positive and negative language, jargon - non-verbal e.g. smiling while talking, body language, hearing and listening - empathy
	4.3 Explain the strengths and weaknesses of verbal and written communications	• strengths and weaknesses including - verbal e.g. face to face, telephone - written e.g. hard copy and electronic
	4.4 Explain how to identify inadequacies in the standard of colleagues' communications with customers	• how to identify inadequacies including - call monitoring - own and/or peer observations - peer and/or customer feedback

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	15	Oversee customer service activities in a contact centre agent team
Contact centre	25	Communicate complex information to customers through a contact centre

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.