Unit Title:		**Principles of using systems and technology in a contact centre**
OCR unit number		4
Sector unit number:		CCTC5
Level:		2
Credit value:		3
Guided learning hours:		21
Unit reference number:		Y/503/0365

Unit purpose and aim

This unit is concerned with knowing how to use features of systems and technology to handle customer contacts in a contact centre and understanding contact centre systems and technology.

Learning Outcomes	Assessment Criteria	Teaching Content

The Learner will:
1 Know how to use features of systems and technology to handle customer contacts in a contact centre
	The Learner can:
	1.1 Describe the purpose of a contact distribution system and how it works
		Candidates should have an understanding of:
		• the purpose of an Automatic Call Distributor (ACD) system including
		  - to manage calls based on handling instructions
		  - to distribute calls equally
		  - to monitor agent performance

	1.2 State procedures for accessing customer information and customer contact handling	• the procedures for accessing information and customer contact handling such as
		• validating identity through
		  - organisational procedures for security
		  - data protection legislation
		  - sector specific legislation

Learning Outcomes	Assessment Criteria	Teaching Content
	1.3 Describe how to adjust individual system settings to facilitate communication with customers	• how to adjust individual settings such as - logging on and off - placing calls on hold, transfer, mute, conference - indicating ready, not ready, wrap time - volume adjustment - logging call type
	1.4 Describe the functionality of a contact distribution system that facilitates customer service	• functionality such as - routing of calls based on contact type and skills set - immediate/real time access to information - automatic updating of information - automatic customer profiles - e-mail, SMS - screen pop
2 Understand contact centre systems and technology	2.1 Describe the customer and contact information needed to produce work plans	Candidates should have an understanding of the: • customer and contact information such as - customer profile - call history
	2.2 Describe the features of systems used to produce customer information and contact handling reports	• features of systems such as - Customer Relationship Management - Computer Telephony Integration - Web Telephony Integration - Integrated Voice Response - Knowledge Management
	2.3 Explain the importance of checking reports before distribution	• the importance of checking report content before distribution to ensure it is fit for purpose in terms of meeting organisational procedures and accuracy

Learning Outcomes	Assessment Criteria	Teaching Content

	2.4 Explain the benefits of systems and technology to customers and contact centres	• benefits of systems and technology such as
		• speed of interaction to
		  - facilitate 1st Call Resolution
		  - agent availability
		• accuracy of information helps
		  - relationships
		  - informs reports
		  - identification of improvements through feedback e.g. formal and informal
		  - planning resources to match call volumes
		  - real time alerts on call volumes, queue waiting, etc
		  - real time and historic information on campaign performance

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	9	Use systems and technology during customer contact in 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.