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| Unit Title: | Support customers and colleagues when providing contact centre services |
| OCR unit number | 13 |
| Sector unit number: | CC32 |
| Level: | 3 |
| Credit value: | 5 |
| Guided learning hours: | 15 |
| Unit reference number: | J/503/0426 |

Unit purpose and aim

This unit concerns being able to communicate information about products and/or services in a contact centre, monitor compliance with organisational requirements for customer contacts, provide advice and support to colleagues and understand how to support colleagues and customers in a contact centre.

| Learning Outcomes | Assessment Criteria | Teaching Content |
|---------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>The Learner will:</p> <p>1 Be able to communicate information about products and/or services to customers in a contact centre</p> | <p>The Learner can:</p> <p>1.1 Validate customers' identity in accordance with organisational procedures</p> <p>1.2 Give customers an overview of products and/or services in accordance with organisational procedures for language and conversation</p> <p>1.3 Resolve customers' problems and queries in a contact centre within their level of authority</p> <p>1.4 Assist customers with decisions about products and/or services in accordance with organisational guidelines, relevant regulation or legislation</p> <p>1.5 Refer customers to someone with greater authority when customers' requests or problems are beyond their level of authority</p> <p>1.6 Record customer problems and complaints in accordance with organisational procedures</p> | <p>This may include an understanding of:</p> <ul style="list-style-type: none"> • The reasons why the customers' identity has to be confirmed and the procedure for doing this. • The range of products or services available and the main points of each. • The organisations guidelines on questioning and information that can be given. • The procedure for referring customers if the problem can't be resolved within own limits of authority • The organisations complaints procedure |

| Learning Outcomes | Assessment Criteria | Teaching Content |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>2 Be able to monitor compliance with organisational requirements for customer contacts</p> | <p>2.1 Monitor compliance with organisational requirements for customer contacts against agreed criteria</p> <p>2.2 Deal with breaches of organisational requirements in accordance with organisational procedures</p> | <p>This may include an understanding of:</p> <ul style="list-style-type: none"> • The regulations and legislation that apply to the centre, and the products and services offered. • The disciplinary procedure, and the grievance procedure of the organisation |
| <p>3 Be able to provide advice and support to colleagues in a contact centre</p> | <p>3.1 Provide advice on matters relating to customers' identity, personal security and products and/or services that meets organisational standards and legislative or regulatory requirements</p> <p>3.2 Provide support that increases colleagues' understanding of organisational requirements and constraints on customer contacts that is commensurate with their needs</p> | <p>This may include an understanding of:</p> <ul style="list-style-type: none"> • The reason for validating the customers' identity. • Data Protection legislation • The organisational monitoring and feedback procedures. |
| <p>4 Understand how to support colleagues and customers in a contact centre</p> | <p>4.1 Explain the effect of organisational and regulatory requirements on supporting colleagues and customers</p> <p>4.2 Explain what constitutes non-compliance with legal and regulatory requirements and the implications of this</p> <p>4.3 Describe different sources of information about the organisation's products and/or services</p> <p>4.4 Explain how to update and maintain knowledge and understanding of products and/or services</p> <p>4.5 Explain the organisational systems for identifying customers and related personal security matters</p> <p>4.6 Explain how buddying and assisting colleagues with handling customer contacts increases understanding of organisational requirements</p> | <p>This may include an understanding of:</p> <ul style="list-style-type: none"> • The regulations and legislation that apply to the centre, and the products and services offered. • The available training and development resources and facilities of the organisation • The benefits of team building and buddying systems. |

Assessment

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

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 support colleagues and customers by providing approved advice and information through contact centre activities appropriate to your job role.

Guidance on assessment and evidence requirements

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

National Occupational Standards (NOS) mapping/signposting

| Occupational Standards | Unit Number | Title |
|------------------------|-------------|-------------------------------------------------------------------------|
| Contact Centre | 32 | Support customers and colleagues when providing contact centre services |

Functional Skills signposting

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

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

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

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