

<b>Unit Title:</b>	<b>Principles of personal and organisational effectiveness in a contact centre</b>
OCR unit number	1
Sector unit number:	CCTC2
Level:	3
Credit value:	2
Guided learning hours:	14
Unit reference number:	F/503/0358

### Unit purpose and aim

This unit is concerned with understanding how to use feedback on performance and how to improve personal and organisational performance in a contact centre.

Learning Outcomes	Assessment Criteria	Teaching Content
<b>The Learner will:</b> 1 Understand how to use feedback on performance in a contact centre	<b>The Learner can:</b> 1.1 Explain the importance of different sources of feedback about performance to the personal development process	Candidates should have an understanding of: <ul style="list-style-type: none"> <li>• the sources of feedback including               <ul style="list-style-type: none"> <li>- calling monitoring records</li> <li>- reports and statistics from systems</li> <li>- 360 degree</li> <li>- customer feedback</li> </ul> </li> </ul>
	1.2 Describe how to analyse feedback from different sources to inform personal development plans	<ul style="list-style-type: none"> <li>• how to analyse feedback including               <ul style="list-style-type: none"> <li>- against individual targets</li> <li>- against team targets</li> <li>- against organisational aims and objectives</li> <li>- for validity and reliability</li> </ul> </li> </ul>
	1.3 Explain the role of the performance review process in improving personal effectiveness and performance	<ul style="list-style-type: none"> <li>• the role of the performance review process including               <ul style="list-style-type: none"> <li>- opportunity for objective, open discussion</li> <li>- provides recognition of targets achieved</li> <li>- agree future goals and aspirations</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Teaching Content
2 Understand how to improve personal and organisational performance in a contact centre	2.1 Describe the importance of taking ownership for developing within the job role	Candidates should have an understanding of the: <ul style="list-style-type: none"> <li>• sources of feedback including <ul style="list-style-type: none"> <li>- calling monitoring records</li> </ul> </li> </ul>
	2.2 Explain the techniques for assessing strengths and areas for development against job role requirements and priorities	<ul style="list-style-type: none"> <li>• techniques of assessing which may include <ul style="list-style-type: none"> <li>- comparing actual against planned targets i.e. call rates, call backs, time on calls, conversion rates, wrap time</li> <li>- analysing feedback from colleagues and coaches/mentors</li> <li>- SWOT analysis</li> <li>- completing online training modules</li> </ul> </li> </ul>
	2.3 Identify how different reasons for personal development affects the type of development resources needed	<ul style="list-style-type: none"> <li>• different reasons for personal development including <ul style="list-style-type: none"> <li>- changes to systems</li> <li>- changes to procedures</li> <li>- personal aspirations i.e. promotion, new role</li> </ul> </li> </ul>
	2.4 Explain the advantages and disadvantages of different formal and informal learning opportunities	<ul style="list-style-type: none"> <li>• type of development resources which may include <ul style="list-style-type: none"> <li>- electronic i.e. intranet, internet, training modules</li> <li>- paper based i.e. books, leaflets, supplier data</li> <li>- internal or external courses</li> <li>- work shadowing</li> <li>- coaching/mentoring</li> </ul> </li> </ul>
	2.5 Describe how the use of personal development resources contributes to improved performance and organisational effectiveness	<ul style="list-style-type: none"> <li>• the use of resources in contributing to improvement including <ul style="list-style-type: none"> <li>- flexibility</li> <li>- cost effectiveness</li> </ul> </li> </ul>
	2.6 Explain the requirements of an effective personal development plan	<ul style="list-style-type: none"> <li>• an effective personal development plan including <ul style="list-style-type: none"> <li>- requirements of current job role</li> <li>- requirements of future job role</li> </ul> </li> </ul>

Learning Outcomes	Assessment Criteria	Teaching Content
		<ul style="list-style-type: none"> <li>- identification of strengths and weaknesses</li> <li>- SMART actions to support development</li> </ul>
	2.7 Explain the importance of reviewing performance and progress against personal and organisational development objectives	<ul style="list-style-type: none"> <li>• the importance of reviewing performance and progress including               <ul style="list-style-type: none"> <li>• for individuals                   <ul style="list-style-type: none"> <li>- recognition of achievements</li> <li>- to set new targets and goals</li> <li>- to identify future aspirations</li> </ul> </li> <li>• for the organisation                   <ul style="list-style-type: none"> <li>- to ensure business targets are being met</li> <li>- to identify poor performance</li> <li>- to identify areas for improvement</li> </ul> </li> </ul> </li> </ul>
	2.8 Explain the techniques for measuring improvements in personal and organisational performance	<ul style="list-style-type: none"> <li>• techniques including               <ul style="list-style-type: none"> <li>- analysis of statistics and reports</li> <li>- call monitoring</li> <li>- mystery callers</li> <li>- CRM data</li> </ul> </li> </ul>

## 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](http://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	2	Seek opportunities to develop your own personal effectiveness at work in a contact centre

## Functional skills signposting

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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

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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

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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](http://www.ocr.org.uk).