QUALIFICATION HANDBOOK

NVQ in Contact Centre Operations (3412)

October 2017 Version 3.0

City & Guilds

Qualification at a glance

Subject area	**Contact Centre Operations**
City & Guilds number	3412
Age group approved	Level 1 Award – All Level 1 Certificate – All Level 2 Certificate – All Level 3 Diploma – 16+ Level 4 Diploma – 18+
Assessment	Portfolio of evidence for each unit
Automatic Approval	Automatic approval available from 2703
Registration and certification	See Walled Garden/online catalogue for last dates

Title and level	City & Guilds number	Accreditation number
Level 1 Award in Contact Centre Operations	3412-01	600/1244/4
Level 1 Certificate in Contact Centre Operations	3412-02	600/1286/9
Level 2 Certificate in Contact Centre Operations	3412-03	600/1135/X
Level 3 Diploma in Contact Centre Operations	3412-04	600/1136/1
Level 4 Diploma in Contact Centre Operations	3412-05	600/1288/2

Version and date	Change detail	Section
2.0 Apr 2013	Correct credit value – Unit 229 + Unit 507	**Structure / Units**
2.1 June 2013	Removed duplicate units listed in roc table	**Structure**
2.2 October 2017	Added GLH and TQT details Removed QCF	**Introduction** **Appendix 2**
3.0 October 2017	Unit 319 and 619 added	**Unit details and Units**

Contents

1	Introduction	5
2	Centre requirements	18
3	Delivering the qualification	20
4	Assessment	21
5	Units	23
Unit 101	Comply with health and safety procedures in a contact centre	25
Unit 102	Use specific features of contact centre systems and technology	27
Unit 103	Contribute to customer service in a contact centre	29
Unit 104	Contribute to sales activities in a contact centre	31
Unit 105	Communicate information to customers through a contact centre	33
Unit 106	Work with others to support customers in a contact centre	35
Unit 201	Improve personal effectiveness at work in a contact centre	37
Unit 202	Use systems and technology during customer contact in a contact centre	39
Unit 203	Deliver customer service through a contact centre	41
Unit 204	Carry out direct sales activities in a contact centre	43
Unit 205	Communicate information to customers in different but familiar contexts through a contact centre	45
Unit 206	Provide support through a contact centre for specified products and/or services	47
Unit 207	Deal with incidents through a contact centre	49
Unit 301	Develop personal and organisational effectiveness in a contact centre	51
Unit 302	Monitor health and safety procedures in a contact centre	53
Unit 303	Support team use of contact centre systems and technology	55
Unit 304	Supervise customer service activities in a contact centre team	57
Unit 305	Lead direct sales activities in a contact centre team	59
Unit 306	Communicate information to customers through a contact centre	61
Unit 307	Contribute to performance management in a contact centre	63
Unit 308	Support customers and colleagues when providing contact centre services	65

Unit 309	Contribute to resource plan development in contact centre operations	67
Unit 310	Manage incidents referred to a contact centre	69
Unit 319*	Manage own professional development within an organisation	71
Unit 401	Improve organisational effectiveness and personal development in a contact centre	73
Unit 402	Manage health and safety procedures in a contact centre	75
Unit 403	Manage the use of contact centre systems and technology	77
Unit 404	Manage customer service delivery in a contact centre	79
Unit 405	Manage direct sales activities in a contact centre	81
Unit 406	Coordinate customer communication processes in a contact centre	83
Unit 407	Manage team and individual performance in contact centre operations	85
Unit 408	Maintain customer support operations in a contact centre	87
Unit 409	Manage resource planning and improvement of resource allocation in a contact centre	89
Unit 410	Manage Incident Management Systems in a contact centre	91
Unit 501	Develop health and safety policy and procedures in a contact centre	93
Unit 502	Develop strategy for contact centre systems and technology	95
Unit 503	Develop customer service procedures for use in a contact centre	97
Unit 504	Manage direct sales operations in a contact centre	99
Unit 505	Develop and enhance performance management in a contact centre	101
Unit 506	Manage the provision of customer support through a contact centre	103
Unit 507	Coordinate resource planning strategy in a contact centre	105
Unit 508	Develop strategy for incident management by a contact centre	107
Unit 619**	Manage own professional development within an organisation	109
Appendix 1	Relationships to other qualifications	111
Appendix 2	Sources of general information	112

1 Introduction

This document tells you what you need to do to deliver the qualifications:

Area	Description
Who are the qualifications for?	This qualification is aimed at learners working in the contact centre industry.
What do the qualifications cover?	Learners will have the opportunity to learn, develop and practice skills required to make an effective contribution to a contact centre environment. Units in the qualification cover all areas of working in a contact centre including aspects of sales, communication, customer support and IT.
Are the qualifications part of a framework or initiative?	This qualification is part of the contact centre apprenticeship framework.
What opportunities for progression are there?	Allow candidates to progress into employment or to the following City & Guilds qualifications: • Customer Service (4430) • Marketing (7734) • Sales (6801) • Contact Centre Skills (3411)

Structure

Level 1 NVQ Award in Contact Centre Operations (QAN 600/1244/4)

To achieve the Level 1 NVQ Award in Contact Centre Operations learners must achieve **12** credits of which at least 7 credits must be at level 1.

Candidates must achieve:

- Both mandatory units from Group A (6 credits)
- A minimum of 3 credits from Group B
- The remaining 3 credits from any other units from Group B or C

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
		Mandatory Group A			
D/503/0352	101	Comply with health and safety procedures in a contact centre	1	9	2
T/503/0342	201	Improve personal effectiveness at work in a contact centre	2	15	4

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
		Optional Group B			
F/503/0361	102	Use specific features of contact centre systems and technology	1	12	3
Y/503/0382	103	Contribute to customer service in a contact centre	1	5	3
F/503/0392	104	Contribute to sales activities in a contact centre	1	6	3
D/503/0402	105	Communicate information to customers through a contact centre	1	10	4
J/503/0412	106	Work with others to support customers in a contact centre	1	10	3
		Optional Group C			
R/601/1209	107	Maintain a positive and customer-friendly attitude	1	33	5
M/601/1508	108	Recognise and deal with customer queries, requests and problems	1	33	5
T/601/1509	109	Take details of customer service problems	1	27	4
F/601/1609	110	Communicate using customer service language	1	30	4
J/502/4299	112	Using Email	1	15	2
T/502/4296	113	Using the Internet	1	20	3
A/502/4378	114	Using Collaborative Technologies	1	20	3
Y/502/4291	115	IT Communication Fundamentals	1	15	2
A/502/4395	117	Bespoke Software	1	15	2
R/601/1548	218	Develop your own customer service skills through self-study	2	40	6
J/502/8577	226	Selling by telephone (in-bound)	2	27	4
J/502/8580	227	Selling by telephone (out-bound)	2	27	4

Level 1 NVQ Certificate in Contact Centre Operations (QAN 600/1286/9)

To achieve the Level 1 NVQ Certificate in Contact Centre Operations learners must achieve **21** credits of which at least 11 credits must be at level 1.

Candidates must achieve:

- Both mandatory units from Group A (6 credits)
- A minimum of 6 credits from Group B
- The remaining 9 credits from any other units from Group B or C with a maximum of 6 credits at level 2
- No more than two units may be taken from units 112, 113 and 114

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
		Mandatory Group A			
D/503/0352	101	Comply with health and safety procedures in a contact centre	1	9	2
T/503/0342	201	Improve personal effectiveness at work in a contact centre	2	15	4
		Optional Group B			
F/503/0361	102	Use specific features of contact centre systems and technology	1	12	3
Y/503/0382	103	Contribute to customer service in a contact centre	1	5	3
F/503/0392	104	Contribute to sales activities in a contact centre	1	6	3
D/503/0402	105	Communicate information to customers through a contact centre	1	10	4
J/503/0412	106	Work with others to support customers in a contact centre	1	10	3
		Optional Group C			
R/601/1209	107	Maintain a positive and customer-friendly attitude	1	33	5
M/601/1508	108	Recognise and deal with customer queries, requests and problems	1	33	5
T/601/1509	109	Take details of customer service problems	1	27	4
F/601/1609	110	Communicate using customer service language	1	30	4
J/502/4299	112	Using Email	1	15	2
T/502/4296	113	Using the Internet	1	20	3
A/502/4378	114	Using Collaborative Technologies	1	20	3

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
Y/502/4291	115	IT Communication Fundamentals	1	15	2
A/502/4395	117	Bespoke Software	1	15	2
R/601/1548	218	Develop your own customer service skills through self-study	2	40	6
J/502/8577	226	Selling by telephone (in-bound)	2	27	4
J/502/8580	227	Selling by telephone (out-bound)	2	27	4

Level 2 NVQ Certificate in Contact Centre Operations (QAN 600/1135/X)

To achieve the Level 2 NVQ Certificate in Contact Centre Operations learners must achieve **28** credits of which at least 15 credits must be at level 2.

Candidates must achieve:

- Both mandatory units from Group A units(6 credits)
- A minimum of 12 credits from Group B units
- The remaining 10 credits from any other Group B or C units
- No more than two units may be taken from units 112, 113, 114 ,116, 221, 222, 223 and 224

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
		Mandatory Group A				
D/503/0352	101	Comply with health and safety procedures in a contact centre	1	9	2	
T/503/0342	201	Improve personal effectiveness at work in a contact centre	2	15	4	
		Optional Group B				
J/503/0362	202	Use systems and technology during customer contact in a contact centre	2	24	4	
L/503/0394	203	Deliver customer service through a contact centre	2	12	5	
L/503/0394	204	Carry out direct sales activities in a contact centre	2	15	5	
H/503/0403	205	Communicate information to customers in different but familiar contexts through a contact centre	2	12	4	

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
L/503/0413	206	Provide support through a contact centre for specified products and/or services	2	18	4	
K/503/0421	207	Deal with incidents through a contact centre	2	40	7	
J/503/0426	308	Support customers and colleagues when providing contact centre services	3	15	5	
		Optional Group C				
L/502/4627	111	Word processing software	1	20	3	
J/502/4299	112	Using Email	1	15	2	221
T/502/4296	113	Using the internet	1	20	3	222
A/502/4378	114	Using Collaborative Technologies	1	20	3	223
Y/502/4291	115	IT Communications Fundamentals	1	15	2	224
L/601/0933	208	Give customers a positive impression of yourself and your organisation	2	33	5	
D/601/0936	209	Promote additional services or products to customers	2	40	6	
H/601/1215	210	Process information about customers	2	33	5	
F/601/1223	211	Deal with incoming telephone calls from customers	2	33	5	
L/601/1225	212	Deal with customers using bespoke software	2	33	5	220
Y/601/1227	213	Maintain customer service through effective hand over	2	27	4	
M/601/1511	214	Resolve customer service problems	2	40	6	
T/601/1512	215	Deliver customer service to difficult customers	2	40	6	
H/601/1540	216	Support customers using on-line customer services	2	33	5	
M/601/1542	217	Buddy a colleague to develop their customer service skills	2	33	5	

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
R/601/1548	218	Develop your own customer service skills through self-study	2	40	6	
L/601/1614	219	Follow the rules to deliver customer service	2	30	4	
F/502/4396	220	Bespoke Software	2	20	3	212
M/502/4300	221	Using Email	2	20	3	112
A/502/4297	222	Using the Internet	2	30	4	113
F/502/4379	223	Using Collaborative Technologies	2	30	4	114
D/502/4292	224	IT Communication Fundamentals	2	15	2	115
F/502/8559	225	Time planning in sales	2	13	2	
J/502/8577	226	Selling by telephone (in-bound)	2	27	4	
J/502/8580	227	Selling by telephone (out-bound)	2	27	4	
D/502/8584	228	Inputting and accessing sales or marketing data in information systems	2	15	2	
M/502/8606	229	Handling objections and closing sales	2	22	3	
D/601/1553	312	Work with others to improve customer service	3	53	8	
D/601/1522	314	Process customer service complaints	3	40	6	
H/600/9660	323	Develop working relationships with colleagues	3	15	3	

Level 3 NVQ Diploma in Contact Centre Operations (QAN 600/1136/1)

To achieve the Level 3 NVQ Diploma in Contact Centre Operations learners must achieve **42** credits of which at least 23 credits must be at level 3.

Candidates must achieve;

- Both mandatory units from Group A units (6 credits)
- A minimum of 21 credits from Group B units
- The remaining 15 credits from any other Group B or C units

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
		Mandatory Group A				
D/503/0352	101	Comply with health and safety procedures in a contact centre	1	9	2	
Y/503/0348	301	Develop personal and organisational effectiveness in a contact centre	3	10	4	
		Optional Group B				
L/503/0394	204	Carry out direct sales activities in a contact centre	2	15	5	
K/503/0421	207	Deal with incidents through a contact centre	2	40	7	
M/503/0355	302	Monitor health and safety procedures in a contact centre	3	20	5	
R/503/0364	303	Support team use of contact centre systems and technology	3	20	6	
T/503/0387	304	Supervise customer service activities in a contact centre team	3	8	4	
D/503/0397	305	Lead direct sales activities in a contact centre team	3	8	4	
K/503/0404	306	Communicate information to customers through a contact centre	3	8	4	
A/503/0407	307	Contribute to performance management in a contact centre	3	12	4	

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
J/503/0426	308	Support customers and colleagues when providing contact centre services	3	15	5	
L/503/0430	309	Contribute to resource plan development in contact centre operations	3	38	7	
K/503/0418	310	Manage incidents referred to a contact centre	3	30	6	
A/503/0388	404	Manage customer service delivery in a contact centre	4	10	6	
H/503/0398	405	Manage direct sales activities in a contact centre	4	12	6	
T/503/0406	406	Coordinate customer communication processes in a contact centre	4	12	6	
L/503/0427	408	Maintain customer support operations in a contact centre	4	8	5	
		Optional Group C				
L/601/1225	212	Deal with customers using bespoke software	2	33	5	318
Y/601/1227	213	Maintain customer service through effective hand over	2	27	4	
H/601/1540	216	Support customers using on-line customer services	2	33	5	
M/601/1542	217	Buddy a colleague to develop their customer service skills	2	33	5	
R/601/1548	218	Develop your own customer service skills through self-study	2	40	6	
M/502/4300	221	Using Email	2	20	3	
A/502/4297	222	Using the Internet	2	30	4	
F/502/4379	223	Using Collaborative Technologies	2	30	4	
D/502/4292	224	IT Communication Fundamentals	2	15	2	
M/502/8606	229	Handling objections and closing sales	2	22	3	

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
K/601/1233	311	Build a customer service knowledge set	3	47	7	
D/601/1553	312	Work with others to improve customer service	3	53	8	
Y/601/1230	313	Organise the delivery of reliable customer service	3	40	6	
D/601/1522	314	Process customer service complaints	3	40	6	
H/601/1568	315	Lead a team to improve customer service	3	47	7	
H/601/1571	316	Gather, analyse and interpret customer feedback	3	67	10	
T/601/1574	317	Monitor the quality of customer service transactions	3	47	7	
J/502/4397	318	Bespoke software	3	30	4	212
L/600/9586	319*	Manage own professional development within an organisation	3	20	4	
M/600/9600	320	Set objectives and provide support for team members	3	35	5	
M/600/9628	321	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility	3	20	4	
L/600/9636	322	Support team members to identify, develop and implement new ideas	3	20	4	
H/600/9660	323	Develop working relationships with colleagues	3	15	3	
Y/600/9669	324	Plan and allocate and monitor work of a team	3	25	5	
R/600/9685	325	Manage conflict in a team	3	20	3	
Y/600/9686	326	Lead and manage meetings	3	20	4	
D/600/9804	327	Manage customer service in own area of responsibility	3	25	4	

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value	Barred units
F/502/8612	328	Negotiating, handling objections and closing sales	3	22	4	
A/502/8639	329	Contributing to the development and launch of new products and / or services	3	26	4	
T/502/8641	330	Leading a sales or marketing team	3	25	4	
T/601/1235	411	Champion customer service	4	67	10	
K/601/1524	412	Handle referred customer complaints	4	67	10	
A/615/8558	619**	Manage own professional development within an organisation	3	20	4	

Level 4 NVQ Diploma in Contact Centre Operations (QAN 600/1288/2)

To achieve the Level 4 NVQ Diploma in Contact Centre Operations learners must achieve **42** credits of which at least 23 credits must be at level 3.

Candidates must achieve;

- Both mandatory units from Group A units (6 credits)
- A minimum of 21 credits from Group B units
- The remaining 15 credits from any other Group B or C units

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
		Mandatory Group A			
D/503/0352	101	Comply with health and safety procedures in a contact centre	1	9	2
R/503/0350	401	Improve organisational effectiveness and personal development in a contact centre	4	10	5
		Optional Group B			
T/503/0387	304	Supervise customer service activities in a contact centre team	3	8	4
A/503/0407	307	Contribute to performance management in a contact centre	3	12	4

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
L/503/0430	309	Contribute to resource plan development in contact centre operations	3	38	7
A/503/0357	402	Manage health and safety procedures in a contact centre	4	20	4
R/503/0378	403	Manage the use of contact centre systems and technology	4	20	6
A/503/0388	404	Manage customer service delivery in a contact centre	4	10	6
H/503/0398	405	Manage direct sales activities in a contact centre	4	12	6
T/503/0406	406	Coordinate customer communication processes in a contact centre	4	12	6
F/503/0408	407	Manage team and individual performance in contact centre operations	4	15	5
L/503/0427	408	Maintain customer support operations in a contact centre	4	8	5
F/503/0425	409	Manage resource planning and improvement of resource allocation in a contact centre	4	20	6
H/503/0417	410	Manage Incident Management Systems in a contact centre	4	12	6
J/503/0359	501	Develop health and safety policy and procedures in a contact centre	5	20	7
L/503/0380	502	Develop strategy for contact centre systems and technology	5	12	7
A/503/0391	503	Develop customer service procedures for use in a contact centre	5	12	6
Y/503/0401	504	Manage direct sales operations in a contact centre	5	30	7
A/503/0410	505	Develop and enhance performance management in a contact centre	5	16	6
Y/503/0429	506	Manage the provision of customer support through a contact centre	5	14	5
T/503/0423	507	Coordinate resource planning strategy in a contact centre	5	12	6
R/503/0414	508	Develop strategy for incident management by a contact centre	5	12	7

Unit accreditation number	City & Guilds unit	Unit title	Level	GLH	Credit value
		Optional Group C			
H/601/1571	316	Gather, analyse and interpret customer feedback	3	67	10
A/502/8639	329	Contributing to the development and launch of new products and / or services	3	26	4
T/601/1235	411	Champion customer service	4	67	10
K/601/1524	412	Handle referred customer complaints	4	67	10
L/601/1578	413	Implement quality improvements to customer service	4	67	10
Y/601/1597	414	Apply technology or other resources to improve customer service	4	73	11
R/601/1601	415	Review and re-engineer customer service processes	4	47	11
R/600/9587	416	Develop, maintain and review personal networks	4	25	4
Y/600/9798	417	Prepare for and support quality audits	4	20	4
M/600/9791	418	Analyse the market in which your organisation operates	4	25	5
Y/600/9588	509	Develop and evaluate operational plans for own area of responsibility	5	25	6
T/600/9632	510	Promote equality of opportunity, diversity and inclusion across an organisation	5	30	6
T/600/9694	511	Developing collaborative relationships with other organisations	5	30	7
A/600/9664	512	Examine staff turnover issues in own area of responsibility	5	25	4

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
Level 2 Certificate in Contact Centre Operations	93	280
Level 3 Diploma in Contact Centre Operations	86	420

2 Centre requirements

Approval

If your Centre is approved to offer the qualification 2703 NVQ for Contact Centres you will get automatic approval for the new 3412 NVQ in Contact Centre Operations.

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* for further information. Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Assessors and internal verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying these qualifications, or meet the relevant experience requirements outlined above.

Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

Candidate entry requirements

City & Guilds does not set entry requirements for these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualifications successfully.

Age restrictions

There is no age restriction for the level 1 and 2 qualifications.

For the level 3 Diploma City & Guilds cannot accept any registrations for candidates under 16 as this qualification is not approved for under 16s.

For the level 4 Diploma City & Guilds cannot accept any registrations for candidates under 18 as this qualification is not approved for under 18s.

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs,
- support and guidance they may need when working towards their qualifications.
- any units they have already completed, or credit they have accumulated which is relevant to the qualifications.
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualifications, their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at: **www.cityandguilds.com/eportfolios**.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre.

Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence for each unit

Assessment strategy

The following sections on assessing performance, simulation and occupational expertise are taken from the assessment strategy provided by Cfa:

Assessing performance

- Assessment of all units in the Level 1 NVQ Award for Contact Centre NVQs may be based on either candidate performance at work or through simulation, as necessary.
- Assessment of all Levels of NVQ Certificates and Diplomas 1 – 4 must be based on candidate performance at work.

Simulation of NVQ units

- Only the Level 1 NVQ Award in Contact Centres can be simulated
- If a unit or part of a unit in the Level 1 NVQ Award is simulated, it must be undertaken in a 'realistic working environment' (RWE).
- Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, 'provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed'.
- Units which have been imported by the CfA in their Contact Centre NVQs and competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

Occupational expertise to assess performance, and moderate and verify assessments

Candidates can be assessed, moderated or verified at work either by:

a. Assessors, moderators or verifiers who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification

OR

b. A trainer, supervisor or manager, employed by an organisation, who must either:

1. Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or:
2. Seek guidance and approval from an awarding organisation to demonstrate that the:

- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units. This is known as the employer direct model.

The full assessment strategy can be found on the Cfa website – **www.cfa.uk.com**

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification.

- RPL is allowed and is not sector specific.

5 Units

Availability of units

Below is a list of all the **contact centre specific units**. The **imported unit packs** can be downloaded from the website **www.cityandguilds.com**

Structure of units

These units each have the following:

- City & Guilds reference number
- unit accreditation number (UAN)
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- learning outcomes which are comprised of a number of assessment criteria

Summary of contact centre specific units

Unit	Unit title	Credits
101	Comply with health and safety procedures in a contact centre	2
102	Use specific features of contact centre systems and technology	3
103	Contribute to customer service in a contact centre	3
104	Contribute to sales activities in a contact centre	3
105	Communicate information to customers through a contact centre	4
106	Work with others to support customers in a contact centre	3
201	Improve personal effectiveness at work in a contact centre	4
202	Use systems and technology during customer contact in a contact centre	4
203	Deliver customer service through a contact centre	5
204	Carry out direct sales activities in a contact centre	5
205	Communicate information to customers in different but familiar contexts through a contact centre	4
206	Provide support through a contact centre for specified products and/or services	4

Unit	Unit title	Credits
207	Deal with incidents through a contact centre	7
301	Develop personal and organisational effectiveness in a contact centre	4
302	Monitor health and safety procedures in a contact centre	5
303	Support team use of contact centre systems and technology	6
304	Supervise customer service activities in a contact centre team	4
305	Lead direct sales activities in a contact centre team	4
306	Communicate information to customers through a contact centre	4
307	Contribute to performance management in a contact centre	4
308	Support customers and colleagues when providing contact centre services	5
309	Contribute to resource plan development in contact centre operations	7
310	Manage incidents referred to a contact centre	6
401	Improve organisational effectiveness and personal development in a contact centre	5
402	Manage health and safety procedures in a contact centre	4
403	Manage the use of contact centre systems and technology	6
404	Manage customer service delivery in a contact centre	6
405	Manage direct sales activities in a contact centre	6
406	Coordinate customer communication processes in a contact centre	6
407	Manage team and individual performance in contact centre operations	5
408	Maintain customer support operations in a contact centre	5
409	Manage resource planning and improvement of resource allocation in a contact centre	6
410	Manage Incident Management Systems in a contact centre	6
501	Develop health and safety policy and procedures in a contact centre	7
502	Develop strategy for contact centre systems and technology	7
503	Develop customer service procedures for use in a contact centre	6
504	Manage direct sales operations in a contact centre	7
505	Develop and enhance performance management in a contact centre	6
506	Manage the provision of customer support through a contact centre	5
507	Coordinate resource planning strategy in a contact centre	6
508	Develop strategy for incident management by a contact centre	7

Unit 101 Comply with health and safety procedures in a contact centre

UAN:	**D/503/0352**
Level:	Level 1
Credit value:	2
GLH:	9
Relationship to NOS:	This unit is linked to Contact Centre NOS 4.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to comply with organisational health and safety procedures in a contact centre, minimise health and safety risks relating to the job role and understand the principles of health and safety in a contact centre

Learning outcome	**The learner will:**
1 Be able to comply with organisational health and safety procedures in a contact centre	
Assessment criteria	
The learner can: 1.1 Identify the health and safety procedures relevant to the job role 1.2 Follow organisational health and safety procedures and techniques at all times 1.3 Follow the organisational and the manufacturer's instructions for the use of equipment and tools	

Learning outcome	**The learner will:**
2 Be able to minimise health and safety risks relating to the job role in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify the health and safety risks relevant to the job role 2.2 List the job role duties and responsibilities for minimising health and safety risks 2.3 Keep the work area clean and tidy in accordance with organisational requirements 2.4 Identify the actions to be taken if health and safety risks are not being minimised	

Learning outcome	The learner will:
3 Understand the principles of health and safety in a contact centre	
Assessment criteria	
The learner can: 3.1 State how health and safety procedures affect their job role 3.2 Explain the purpose and use of safety-related equipment 3.3 Explain how to lift and handle heavy objects safely 3.4 Describe the health and safety hazards relevant to the job role 3.5 Describe common health and safety standards in the workplace including excessive noise, prolonged use of display screens and hazardous substances 3.6 Explain why it is important to keep the work area clean and tidy 3.7 State the difference between hazard and risk in the work area	

Unit 102 Use specific features of contact centre systems and technology

UAN:	**F/503/0361**
Level:	Level 1
Credit value:	3
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 8.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to use contact centre systems and technology to carry out customer contact tasks and understand contact centre systems and technology

Learning outcome	**The learner will:**
1 Be able to use contact centre systems and technology to carry out customer contact tasks	
Assessment criteria	
The learner can: 1.1 Log into the technology system that is appropriate for dealing with customer contacts 1.2 Follow defined pathways through the system to complete customer contact tasks 1.3 Use features of the technology contact handling system to control customer contacts 1.4 Locate information on the system needed to complete a customer contact 1.5 Identify to whom to refer when the customer contact cannot be completed 1.6 Input information into the system in accordance with organisational procedures 1.7 Validate the customer's identity from information given and information held on the system	

Learning outcome	The learner will:
2 Understand contact centre systems and technology	
Assessment criteria	
The learner can: 2.1 State the organisational procedures and guidelines for handling customer contacts 2.2 List the products and/or services offered or supported by the contact centre 2.3 List the regulation and/or legislation relevant to the contact centre's work with customers 2.4 State to whom to pass contacts when they are outside the limits of their authority or the customer contact is too difficult to handle 2.5 State the procedures for logging onto the technology systems 2.6 State how to respond to prompts from the system indicating the pathway to be followed 2.7 State how to use systems and technology to handle customer contacts 2.8 Identify the categories of customer contacts that they are authorised to handle	

Unit 103 Contribute to customer service in a contact centre

UAN:	**Y/503/0382**
Level:	Level 1
Credit value:	3
GLH:	5
Relationship to NOS:	This unit is linked to Contact Centre NOS 13.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to meet customer expectations in a contact centre, meet organisational and regulatory requirements during customer contact, gather specified customer satisfaction information in a contact centre and understand the purpose of customer service in a contact centre

Learning outcome	**The learner will:**
1 Be able to meet customer expectations in a contact centre	
Assessment criteria	
The learner can: 1.1 Greet customers in accordance with organisational guidelines 1.2 Provide requested information about products and/or services 1.3 Check the customer's understanding of the information provided 1.4 Close the customer contact in accordance with organisational guidelines	

Learning outcome	**The learner will:**
2 Be able to meet organisational and regulatory requirements during customer contact	
Assessment criteria	
The learner can: 2.1 Deal with customers within organisational and regulatory restrictions 2.2 Explain to customers the limitations of the information that can be provided 2.3 Meet customer expectations of respect and politeness when delivering service within defined limits	

Learning outcome	The learner will:
3 Be able to gather specified customer satisfaction information in a contact centre	
Assessment criteria	
The learner can: 3.1 Identify the customer satisfaction questions that should be asked 3.2 Ask customers specified questions about their level of satisfaction with service through the contact centre 3.3 Record responses to customer satisfaction in accordance with organisational guidelines	

Learning outcome	The learner will:
4 Understand the purpose of customer service in a contact centre	
Assessment criteria	
The learner can: 4.1 List the products and/or services offered or supported by the contact centre 4.2 Explain how customer satisfaction can be influenced by behaviour toward the customer 4.3 State the organisational requirements and regulation and/or legislation that place limits on the customer service that can be provided 4.4 State to whom to refer dissatisfied customers	

Unit 104 Contribute to sales activities in a contact centre

UAN:	**F/503/0392**
Level:	Level 1
Credit value:	3
GLH:	6
Relationship to NOS:	This unit is linked to Contact Centre NOS 18.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to gather and use specified sales information in a contact centre, make direct sales to customers and understand sales activities in a contact centre

Learning outcome	**The learner will:**
1 Be able to gather and use specified sales information in a contact centre	
Assessment criteria	
The learner can: 1.1 Gather the specified information about customers, products and/or services in accordance with organisational procedures 1.2 Provide information to customers about products and/or services in accordance with organisational procedures 1.3 Collect from customers information that supports potential sales in accordance with organisational procedures 1.4 Check with customers the accuracy of the information provided 1.5 Keep records of customers in accordance with organisational procedures	

Learning outcome	**The learner will:**
2 Be able to make direct sales to customers through a contact centre	
Assessment criteria	
The learner can: 2.1 Identify customers in accordance with organisational procedures 2.2 Establish customers' needs for potential sales of products and/or services within their level of authority 2.3 Check with customers the accuracy of the order 2.4 Refer customers to an authorised colleague when sales requests are beyond their level of authority	

2.5 Complete the authorisation or payment in accordance with organisational procedures

Learning outcome	**The learner will:**
3 Understand sales activities in a contact centre	
Assessment criteria	
The learner can: 3.1 List the products and/or services offered or supported by the contact centre 3.2 List the regulations and/or legislation that has an impact on dealing with customers 3.3 State the organisational procedures for processing sales and payments and/or establishing order authority with customers	

Unit 105 Communicate information to customers through a contact centre

UAN:	**D/503/0402**
Level:	Level 1
Credit value:	4
GLH:	10
Relationship to NOS:	This unit is linked to Contact Centre NOS 23.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to talk to customers on a familiar subject in a contact centre, communicate in writing on a familiar subject and understand how to communicate with customers in a contact centre

Learning outcome	**The learner will:**
1 Be able to talk to customers on a familiar subject in a contact centre	
Assessment criteria	
The learner can: 1.1 Greet customers in accordance with organisational guidelines 1.2 Describe the products and/or services to customers in accordance with organisational guidelines 1.3 Speak to customers in a way that makes them feel confident about what is being said 1.4 Use positive language when describing products and/or services	

Learning outcome	**The learner will:**
2 Be able to communicate in writing on a familiar subject in a contact centre	
Assessment criteria	
The learner can: 2.1 Complete written communications to customers in accordance with organisational guidelines 2.2 Present written communications with customers in formats that comply with organisational guidelines 2.3 Confirm that written communications are grammatically correct; spelled correctly and in house style before sending	

Learning outcome	The learner will:
3 Understand how to communicate with customers in a contact centre	
Assessment criteria	
The learner can: 3.1 State the products and/or services offered or supported by the contact centre 3.2 List the organisational requirements and/or regulations about what can and cannot be expressed to customers verbally and/or in writing 3.3 State what information is best given to customers verbally and what is best given in writing 3.4 Explain the difference between positive and negative language when communicating with customers verbally and/or in writing 3.5 Explain how to demonstrate 'active listening'	

Unit 106 Work with others to support customers in a contact centre

UAN:	**J/503/0412**
Level:	Level 1
Credit value:	3
GLH:	10
Relationship to NOS:	This unit is linked to Contact Centre NOS 30.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to establish and validate customers' identities in a contact centre, communicate information about specified products and/or services, hand over customer contacts to others and understand support for customers in a contact centre

Learning outcome	**The learner will:**
1 Be able to establish and validate customers' identities in a contact centre	
Assessment criteria	
The learner can: 1.1 Use agreed greetings and openings for customer conversations 1.2 Link customers' identity with organisational records 1.3 Confirm customers' identity and authority in accordance with organisational procedures 1.4 Inform customers of what can or cannot be handled if their identity cannot be confirmed	

Learning outcome	**The learner will:**
2 Be able to communicate information about specified products and/or services in a contact centre	
Assessment criteria	
The learner can: 2.1 Establish the products and/or services about which customers need information 2.2 Give customers a summarised introduction to requested products and/or services 2.3 Deal with customers within the agreed limits of what can be handled 2.4 Conclude a customer contact in accordance with organisational procedures	

Learning outcome	The learner will:
3 Be able to hand over customer contacts to others in a contact centre	
Assessment criteria	
The learner can: 3.1 Refer customers elsewhere when they require information outside their limits of authority or knowledge 3.2 Explain to customers why and how they will be passed to someone else in accordance with organisational procedures 3.3 Provide as much information as possible about the customer contact prior to recording the contact	

Learning outcome	The learner will:
4 Understand how support for customers in a contact centre is provided	
Assessment criteria	
The learner can: 4.1 List the products and/or services offered or supported by the contact centre 4.2 List the regulations and/or legislation that has an impact on customers 4.3 Explain how to use communication equipment for dealing with customer contacts 4.4 State how and when to escalate a customer contact 4.5 Describe the listening and questioning techniques to establish the information needed by customers	

Unit 201 Improve personal effectiveness at work in a contact centre

UAN:	**T/503/0342**
Level:	Level 2
Credit value:	4
GLH:	15
Relationship to NOS:	This unit is linked to Contact Centre NOS 1.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to assess personal effectiveness in a contact centre, carry out development activities to improve personal effectiveness, work with others in a contact centre team to improve personal performance and understand how to improve personal effectiveness in a contact centre

Learning outcome	**The learner will:**
1 Be able to assess personal effectiveness in a contact centre	
Assessment criteria	
The learner can: 1.1 Identify strengths and areas for development in skills and knowledge against agreed criteria 1.2 Agree learning actions that address priority learning and personal development needs	

Learning outcome	**The learner will:**
2 Be able to carry out development activities to improve personal effectiveness in a contact centre	
Assessment criteria	
The learner can: 2.1 Participate in programme of learning activities that supports personal development needs 2.2 Use feedback from participation in the agreed development activities to improve personal performance	

Learning outcome	The learner will:
3 Be able to work with others in a contact centre team to improve personal performance	
Assessment criteria	
The learner can: 3.1 Identify how everyday work in a team leads to learning and personal development 3.2 Participate in team tasks that provide on-the-job learning opportunities 3.3 Use feedback on personal performance to plan further learning steps	

Learning outcome	The learner will:
4 Understand how to improve personal effectiveness in a contact centre	
Assessment criteria	
The learner can: 4.1 Describe the organisational procedures and guidelines for contact centre tasks defined by their job role 4.2 Describe the range of products and/or services offered or supported by the contact centre 4.3 Describe the impact of legislation and/or regulations on their role within the contact centre 4.4 Explain the importance of using development activities that are relevant to identified business needs 4.5 Explain different sources of feedback to the personal development process 4.6 Explain the importance of feedback to the personal development process 4.7 Explain the importance of involving a person in authority in making a personal development plan	

Unit 202 Use systems and technology during customer contact in a contact centre

UAN:	**J/503/0362**
Level:	Level 2
Credit value:	4
GLH:	24
Relationship to NOS:	This unit is linked to Contact Centre NOS 9.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to use features of systems and technology to handle customer contacts in a contact centre, report on customer and contact handling information using pre-defined formats and understand the uses of contact centre systems and technology

Learning outcome	**The learner will:**
1 Be able to use features of systems and technology to handle customer contacts in a contact centre	
Assessment criteria	
The learner can: 1.1 Handle contacts identified by the contact distribution system in accordance with organisational procedures 1.2 Access customer information through the system in accordance with organisational procedures 1.3 Adjust individual system settings to enable communication with customers through interactive functionality specific to the job role 1.4 Enhance customer service by making maximum use of the available functionality	

Learning outcome	**The learner will:**
2 Be able to report on customer and contact handling information using pre-defined formats	
Assessment criteria	
The learner can: 2.1 Identify the customer and contact handling information needed for personal work planning and organisational reporting 2.2 Produce customer information and contact handling reports according to organisational guidelines and standards	

Learning outcome	The learner will:
3 Understand the uses of contact centre systems and technology	
Assessment criteria	
The learner can: 3.1 Explain the benefits of different technology systems in terms of their ability to facilitate communication with customers 3.2 Describe the products and/or services offered or supported by the contact centre 3.3 Describe the organisational requirements and regulation or legislation that have an impact on the contact centre's operations 3.4 Describe the organisational procedures and guidelines for customer contact handling 3.5 Describe the purpose of contact distribution systems and how the organisation's system works 3.6 State the reasons for checking the sense of reports before issuing	

Unit 203 Deliver customer service through a contact centre

UAN:	**L/503/0394**
Level:	Level 2
Credit value:	5
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 14.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to establish rapport with customers in a contact centre, support customer service delivery, deliver customer service and understand customer service in contact centres

Learning outcome	**The learner will:**
1 Be able to establish rapport with customers in a contact centre	
Assessment criteria	
The learner can: 1.1 Follow organisational guidelines for greeting and identifying customers 1.2 Explain the features and benefits of products and/or services to customers in accordance with organisational requirements 1.3 Provide the required information in response to customer requests 1.4 Check customers' understanding of the information provided 1.5 Identify options for the resolution of customers' queries that meet their needs 1.6 Close the customer contact in accordance with organisational guidelines	

Learning outcome	**The learner will:**
2 Be able to support customer service delivery through a contact centre	
Assessment criteria	
The learner can: 2.1 Identify precisely customers' needs or requests 2.2 Check understanding of customers' needs by summarising their queries and requests 2.3 Keep records of customer queries or requests in accordance with organisational procedures 2.4 Use information collected from customers to enhance customer service delivery	

Learning outcome	The learner will:
3 Be able to deliver customer service in a contact centre	
Assessment criteria	
The learner can: 3.1 Establish the limit of their authority for dealing with customers 3.2 Explain to customers when their enquiry must be referred to someone else because authority limits have been exceeded 3.3 Comply with regulatory requirements during customer contacts 3.4 Explain the regulatory constraints to the customer when they affect customer service	

Learning outcome	The learner will:
4 Understand customer service in contact centres	
Assessment criteria	
The learner can: 4.1 Describe the limitations of the service offer that can be made to customers 4.2 Describe the limits of authority in dealing with customers 4.3 Explain the importance of checking customers' understanding of information provided 4.4 Explain the importance of closing a customer contact in a professional way in accordance with organisational procedures and standards 4.5 Describe the sources of information to be checked in order to update knowledge and understanding of organisational and regulatory requirements 4.6 Explain the importance of understanding the customer's message 4.7 Describe methods of adapting communication with customers to meet their expectations	

Unit 204 Carry out direct sales activities in a contact centre

UAN:	**L/503/0394**
Level:	Level 2
Credit value:	5
GLH:	15
Relationship to NOS:	This unit is linked to Contact Centre NOS 19.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to gather information needed for direct sales activities in a contact centre, carry out direct sales to customers, keep direct sales records, comply with regulations and legislation during direct sales and understand how to conduct sales activities in a contact centre

Learning outcome	**The learner will:**
1 Be able to gather information needed for direct sales activities in a contact centre	
Assessment criteria	
The learner can: 1.1 Assemble information about products and/or services that support direct sales 1.2 Obtain from customers sufficient information to support direct sales activities 1.3 Create sales opportunities by making links between information provided by customers and products and/or services 1.4 Find potential new customers for products and/or services	

Learning outcome	**The learner will:**
2 Be able to carry out direct sales to customers through a contact centre	
Assessment criteria	
The learner can: 2.1 Establish customers' identity in accordance with organisational procedures 2.2 Check customers' wishes and needs 2.3 Identify possible matches with products and/or services from information provided by customers 2.4 Explain to customers the features and benefits of products and/or	

services for sale 2.5 Adapt their sales approach and style to meet customer preferences 2.6 Maximise opportunities for cross-selling and up-selling 2.7 Complete the authorisation or payment in accordance with organisational procedures

Learning outcome	**The learner will:**
3 Be able to keep direct sales records within a contact centre	
Assessment criteria	
The learner can: 3.1 Identify the information about customers, products and/or services that should be recorded during the sales process 3.2 Record customer, product and/or service information in accordance with organisational procedures	

Learning outcome	**The learner will:**
4 Be able to comply with regulations and legislation during direct sales in a contact centre	
Assessment criteria	
The learner can: 4.1 Identify the regulatory requirements that have an impact on direct sales activities through a contact centre 4.2 Ensure compliance with regulations during direct selling through a contact centre	

Learning outcome	**The learner will:**
5 Understand how to conduct sales activities in a contact centre	
Assessment criteria	
The learner can: 5.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre 5.2 Describe the organisational policies and procedures for direct sales through a contact centre 5.3 Describe the organisational requirements and regulation or legislation that have an impact on direct sales activities 5.4 Describe the common objections and questions raised by customers during direct selling 5.5 Explain how to identify cross-selling and up-selling opportunities 5.6 Describe different methods of researching potential new customers 5.7 Explain how to retrieve information from organisational sales records 5.8 Describe the organisational procedures for ensuring compliance with relevant regulation and legislation that have an impact on direct selling	

Unit 205 Communicate information to customers in different but familiar contexts through a contact centre

UAN:	**H/503/0403**
Level:	Level 2
Credit value:	4
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 24.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to talk to customers on familiar subjects in a contact centre, communicate in writing on familiar subjects and understand the requirements of customer communication in a contact centre

Learning outcome	**The learner will:**
1 Be able to talk to customers on familiar subjects in a contact centre	
Assessment criteria	
The learner can: 1.1 Establish a rapport with customers in accordance with organisational guidelines 1.2 Describe products and/or services to customers in accordance with organisational guidelines 1.3 Provide the required information in response to customer questions about products and/or services 1.4 Vary the tone of voice to maintain customers' interest in products and/or services 1.5 Display 'active listening' by replaying customers' comments back to them	

Learning outcome	**The learner will:**
2 Be able to communicate in writing on familiar subjects in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify when a customer contact would benefit from written communications	

2.2 Produce written communications in accordance with organisational guidelines
2.3 Comply with recommended formats and layouts for written communications with customers
2.4 Ensure that written communications are concise and the meaning is clear
2.5 Ensure that written communications are accurate in content, spelling and grammar and conform with organisational guidelines before dispatch

Learning outcome	**The learner will:**
3 Understand the requirements of customer communication in a contact centre	
Assessment criteria	
The learner can: 3.1 Describe the products and/or services offered or supported by the contact centre 3.2 Describe the organisational requirements and regulations about what can and cannot be expressed to customers verbally and/or in writing 3.3 Explain what information is best given to customers verbally and what is best given in writing 3.4 Explain how positive and negative language affects communications with customers verbally and/or in writing 3.5 List the frequently asked questions from customers about products and/or services and responses to them 3.6 Explain the importance of varying tone when talking to customers 3.7 Explain the benefits and drawbacks of communicating with customers by telephone and in writing 3.8 Explain the importance of reviewing and proof-reading before sending written communications to customers	

Unit 206 Provide support through a contact centre for specified products and/or services

UAN:	**L/503/0413**
Level:	Level 2
Credit value:	4
GLH:	18
Relationship to NOS:	This unit is linked to Contact Centre NOS 31.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to establish and validate customers' identity, support customer needs for information and decisions about a range of products and/or services and understand support for customers in a contact centre

Learning outcome	**The learner will:**
1 Be able to establish and validate customers' identity in a contact centre	
Assessment criteria	
The learner can: 1.1 Link customers' identities with correct organisational records 1.2 Confirm customers' identities and authorities in accordance with organisational procedures 1.3 Record any departure from the standard authorisation process in accordance with organisational procedures 1.4 Explain to customers the reasons for the authorisation procedures	

Learning outcome	**The learner will:**
2 Be able to support customer needs for information and decisions about a range of products and/or services in a contact centre	
Assessment criteria	
The learner can: 2.1 Provide customers with the required information across a range of products and/or services 2.2 Use language and conversation in accordance with organisational guidelines 2.3 Make use of the features of communication equipment specified within the job role 2.4 Offer customers options for different requests about products and/or services that meet their requirements	

2.5 Resolve customers' problems within their level of authority 2.6 Refer customers to someone with greater authority when customers' needs cannot be met within the limits of their authority 2.7 Comply with organisational procedures during customer contacts

Learning outcome	**The learner will:**
3 Understand how to support customers in a contact centre	
Assessment criteria	
The learner can: 3.1 Describe the features and uses of products and/or services with which they can deal 3.2 Describe ways of maintaining and updating knowledge and understanding of products and/or services 3.3 Explain the regulations and legislation that have an impact on contact with customers	

Unit 207 Deal with incidents through a contact centre

UAN:	**K/503/0421**
Level:	Level 2
Credit value:	7
GLH:	40
Relationship to NOS:	This unit is linked to Contact Centre NOS 38.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to deal with incidents through a contact centre, use contact centre communications systems to deploy incident management resources and understand how to deal with incidents in a contact centre

Learning outcome	**The learner will:**
1 Be able to deal with incidents through a contact centre	
Assessment criteria	
The learner can: 1.1 Respond to incoming calls in a calm and professional manner 1.2 Maintain control of the conversation 1.3 Record the contact and information in an incident log in accordance with organisational procedures 1.4 Assess and prioritise reported incidents in accordance with organisational procedures 1.5 Pass accurate and concise contact information to those responsible for taking action in accordance with organisational procedures 1.6 Provide information, advice and support in response to requests in accordance with organisational procedures 1.7 Escalate incident responses in accordance with organisational procedures	

Learning outcome	**The learner will:**
2 Be able to use contact centre communications systems to deploy incident management resources	
Assessment criteria	
The learner can: 2.1 Communicate with external organisations in accordance with organisational procedures	

2.2 Use the most efficient means (voice or data options) to communicate with those dealing with the incident 2.3 Use agreed conventions of wording, style and approach appropriate for different communication media

Learning outcome	**The learner will:**
3 Understand how to deal with incidents in a contact centre	
Assessment criteria	
The learner can: 3.1 Describe the incident management services offered by the contact centre 3.2 Describe the impact of regulation or legislation on incident management 3.3 Describe the purpose and use of decision trees 3.4 Describe how to determine the appropriate allocation of resources to incidents 3.5 Describe the boundaries of a contact incident that justify actions being escalated to different levels of response 3.6 Describe the nature and limits of instructions and advice that can be passed on to a contact reporting an incident 3.7 Describe standard wording and codes used by the organisation when dealing with incident management 3.8 Describe the type and extent of resources available for deployment in incident management	

Unit 301 Develop personal and organisational effectiveness in a contact centre

UAN:	**Y/503/0348**
Level:	Level 3
Credit value:	4
GLH:	10
Relationship to NOS:	This unit is linked to Contact Centre NOS 2.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to improve performance in a contact centre, obtain feedback on work performance, use feedback to improve personal and organisational effectiveness and understand the principles underpinning personal and organisational effectiveness in a contact centre

Learning outcome	**The learner will:**
1 Be able to improve performance in a contact centre	
Assessment criteria	
The learner can: 1.1 Assess strengths and areas for personal development in the skills and knowledge needed to fulfil job role requirements 1.2 Prioritise areas for personal development against job role requirements 1.3 Identify development activities that are appropriate for improving identified areas for development 1.4 Use learning from development activities in the job role within the agreed timescale	

Learning outcome	**The learner will:**
2 Be able to obtain feedback on work performance in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify sources of feedback that will help develop personal and organisational effectiveness 2.2 Obtain feedback from different sources that are relevant to their job role	

Learning outcome	The learner will:
3 Be able to use feedback to improve personal and organisational effectiveness in a contact centre	
Assessment criteria	
The learner can: 3.1 Agree with a person in authority the actions to be undertaken as a result of an analysis of the feedback 3.2 Agree a development plan with a person in authority which includes agreed objectives 3.3 Implement agreed actions in accordance with the development plan 3.4 Evaluate the effectiveness of the development plan against agreed objectives	

Learning outcome	The learner will:
4 Understand the principles underpinning personal and organisational effectiveness in a contact centre	
Assessment criteria	
The learner can: 4.1 Explain the products and/or services offered or supported by the contact centre 4.2 Explain the requirements of contact centre operational procedures and guidelines 4.3 Explain the regulation and legislation that have an impact on contact centre operations 4.4 Explain the importance of taking responsibility for personal development 4.5 Describe self-assessment techniques for measuring personal strengths and weaknesses 4.6 Explain the importance of prioritising actions to develop personal and organisational effectiveness 4.7 Explain methods for analysing feedback about personal and organisational effectiveness	

Unit 302 Monitor health and safety procedures in a contact centre

UAN:	**M/503/0355**
Level:	Level 3
Credit value:	5
GLH:	20
Relationship to NOS:	This unit is linked to Contact Centre NOS 5.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to assess health and safety risks in a contact centre, monitor compliance with health and safety procedures, provide guidance on health and safety matters and understand the principles underpinning health and safety in their area of work in a contact centre

Learning outcome	**The learner will:**
1 Be able to assess health and safety risks in a contact centre	
Assessment criteria	
The learner can: 1.1 Identify the work areas that are subject to a risk assessment 1.2 Follow organisational procedures for assessing risk 1.3 Schedule health and safety risk assessments and audits 1.4 Establish the consequences of identified risks 1.5 Make recommendations for action that address the identified risks	

Learning outcome	**The learner will:**
2 Be able to monitor compliance with health and safety procedures in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify the health and safety procedures relevant to the job role 2.2 Use a compliance plan that addresses identified risks and is capable of identifying new risks 2.3 Carry out routine checks in accordance with the compliance plan 2.4 Communicate the findings of health and safety risk assessments and compliance monitoring to those who need to know	

Learning outcome	The learner will:
3 Be able to provide guidance on health and safety matters in a contact centre	
Assessment criteria	
The learner can: 3.1 Identify the individuals who need information and advice on health and safety matters 3.2 Identify the requirements in health and safety procedures that are specific to contact centre job roles 3.3 Communicate information and advice on health and safety matters by the method that is appropriate for different contact centre job roles	

Learning outcome	The learner will:
4 Understand the principles underpinning health and safety in their area of work in a contact centre	
Assessment criteria	
The learner can: 4.1 Explain the health and safety regulations and legislation that are relevant to their area of work in the contact centre 4.2 Explain how to identify activities in the contact centre that require a risk assessment 4.3 Explain organisational procedures for health and safety risk assessment in the contact centre 4.4 Explain different options for action to mitigate health and safety risks in the contact centre 4.5 Explain the advantages and disadvantages of different ways of communicating findings and recommendations on risk assessments 4.6 Explain how the findings of health and safety risk assessments fit within general health and safety audits	

Unit 303 Support team use of contact centre systems and technology

UAN:	**R/503/0364**
Level:	Level 3
Credit value:	6
GLH:	20
Relationship to NOS:	This unit is linked to Contact Centre NOS 10.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to provide guidance to colleagues on contact centre systems and technology, produce new reports, adjust system parameters to optimise performance, report on potential system enhancements and understand use of systems and technology to support contact centre operations

Learning outcome	**The learner will:**
1 Be able to provide guidance to colleagues on contact centre systems and technology	
Assessment criteria	
The learner can: 1.1 Provide advice and guidance in the use of technological functionality that enables optimum efficiency 1.2 Deliver coaching/buddying activities for colleagues in accordance with their development plans	

Learning outcome	**The learner will:**
2 Be able to produce new reports in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify contact metrics to be included in reports that are capable of contributing to organisational understanding of contact patterns 2.2 Produce new reports that meet the agreed requirements 2.3 Manipulate data according to organisational guidelines to make the most effective presentation of reports	

Learning outcome	The learner will:
3 Be able to adjust system parameters to optimise performance in a contact centre	
Assessment criteria	
The learner can: 3.1 Predict the effects of alterations to applications and systems according to organisational policy and practices 3.2 Change routing rules to adjust contact priorities that meet resource availability and customer expectations 3.3 Identify data flow changes resulting from system updates 3.4 Evaluate the benefits and drawbacks of changes to different routing parameters 3.5 Manage predictive contact queuing efficiently	

Learning outcome	The learner will:
4 Be able to report on potential system enhancements in a contact centre	
Assessment criteria	
The learner can: 4.1 Identify areas where a system may benefit from modification 4.2 Evaluate the potential benefits from system modifications against the resource cost of implementation 4.3 Present findings and recommendations in accordance with organisational procedures	

Learning outcome	The learner will:
5 Understand the use of systems and technology to support contact centre operations	
Assessment criteria	
The learner can: 5.1 Describe the products and/or services offered or supported by the contact centre 5.2 Explain the regulations or legislation that have an impact on contact centre operations 5.3 Explain the organisational procedures and guidelines for contact centre operations 5.4 Explain the organisational procedures and guidelines for the configuration of system parameters 5.5 Explain the advantages and disadvantages of routing rule options 5.6 Explain the importance of predictive contact queuing to manage contact distribution	

Unit 304 Supervise customer service activities in a contact centre team

UAN:	**T/503/0387**
Level:	Level 3
Credit value:	4
GLH:	8
Relationship to NOS:	This unit is linked to Contact Centre NOS 15.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to resolve difficulties in customer service in a contact centre, monitor customer service performance and compliance with contact centre organisational and regulatory requirements and understand customer service activities in contact centres

Learning outcome	**The learner will:**
1 Be able to resolve difficulties in customer service in a contact centre	
Assessment criteria	
The learner can: 1.1 Resolve difficulties relating to customer identification and validation within the level of authority in accordance with organisational procedures 1.2 Resolve customer concerns referred from colleagues in accordance with organisational procedures 1.3 Provide advice to colleagues in customer service delivery in accordance with organisational procedures 1.4 Report customer issues that might impact on customer service delivery in accordance with organisational procedures	

Learning outcome	**The learner will:**
2 Be able to monitor customer service performance and compliance with contact centre organisational and regulatory requirements	
Assessment criteria	
The learner can: 2.1 Identify customer issues that might impact on customer service delivery 2.2 Test the quality of customer service delivery through monitoring performance against agreed Key Performance Indicators (KPIs)	

2.3 Validate monitoring data of customer service performance against other evidence 2.4 Identify areas for enhancement in customer service from an analysis of monitoring data 2.5 Inform colleagues of monitoring results in accordance with organisational procedures

Learning outcome	**The learner will:**
3 Understand customer service activities in contact centres	
Assessment criteria	
The learner can: 3.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre 3.2 Explain organisational and regulatory requirements of customer service delivery in the contact centre 3.3 Describe the organisation's customer service aims and objectives and the service offer of the contact centre 3.4 Explain the importance of supporting colleagues by dealing with customer queries and issues that are outside their authority 3.5 Explain how to design key performance indicators (KPIs)	

Unit 305 Lead direct sales activities in a contact centre team

UAN:	**D/503/0397**
Level:	Level 3
Credit value:	4
GLH:	8
Relationship to NOS:	This unit is linked to Contact Centre NOS 20.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to carry out sales activities in a contact centre, analyse contact centre sales data, lead a team involved in direct sales activities and understand sales activities in a contact centre team

Learning outcome	**The learner will:**
1 Be able to carry out sales activities in a contact centre	
Assessment criteria	
The learner can: 1.1 Prepare for a direct sales activity in accordance with organisational procedures 1.2 Establish customer wishes and needs 1.3 Offer options to customers by linking their wishes and needs to products and/or services 1.4 Adapt their sales style and techniques to mirror customer wishes and behaviour 1.5 Close the sale by agreement with the customer during the customer contact 1.6 Record the confirmed order in accordance with organisational procedures 1.7 Ensure compliance with relevant regulation and legislation that has an impact on direct sales through a contact centre 1.8 Complete the authorisation or payment in accordance with organisational procedures	

Learning outcome	The learner will:
2 Be able to analyse contact centre sales data	
Assessment criteria	
The learner can: 2.1 Collate sales data from direct sales activities in a format that enables data manipulation 2.2 Analyse sales performance against market and customer trends 2.3 Summarise the results of the sales analysis to enable the formulation of a sales plan	

Learning outcome	The learner will:
3 Be able to lead a team involved in direct sales activities in a contact centre	
Assessment criteria	
The learner can: 3.1 Identify sales activities which are capable of fulfilling the sales plan 3.2 Agree realistic and achievable team sales targets including cross-selling and up-selling 3.3 Monitor the team's sales performance against agreed targets 3.4 Identify opportunities for improving sales performance through a review of contact centre team sales performance and approach 3.5 Provide encouragement and guidance to team colleagues during sales activities	

Learning outcome	The learner will:
4 Understand sales activities in a contact centre team	
Assessment criteria	
The learner can: 4.1 Explain the features and benefits of the products and/or services offered or supported by the contact centre 4.2 Explain the organisational and regulatory requirements of direct sales activities 4.3 Explain the techniques for overcoming objections and questions from customers during sales activities 4.4 Explain the importance of adapting their style and approach to mirror customers' style and perspective 4.5 Explain the importance of setting a good example in a contact centre team 4.6 Explain how to set sales targets including cross-selling and up-selling	

Unit 306 Communicate information to customers through a contact centre

UAN:	**K/503/0404**
Level:	Level 3
Credit value:	4
GLH:	8
Relationship to NOS:	This unit is linked to Contact Centre NOS 23.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to talk to customers on a familiar subject in a contact centre, communicate in writing on a familiar subject and understand how to communicate with customers in a contact centre

Learning outcome	**The learner will:**
1 Be able to talk to customers on a familiar subject in a contact centre	
Assessment criteria	
The learner can: 1.1 Greet customers in accordance with organisational guidelines 1.2 Describe the products and/or services to customers in accordance with organisational guidelines 1.3 Speak to customers in a way that makes them feel confident about what is being said 1.4 Use positive language when describing products and/or services	

Learning outcome	**The learner will:**
2 Be able to communicate in writing on a familiar subject in a contact centre	
Assessment criteria	
The learner can: 2.1 Complete written communications to customers in accordance with organisational guidelines 2.2 Present written communications with customers in formats that comply with organisational guidelines 2.3 Confirm that written communications are grammatically correct; spelled correctly and in house style before sending	

Learning outcome	The learner will:
3 Understand how to communicate with customers in a contact centre	
Assessment criteria	
The learner can: 3.1 State the products and/or services offered or supported by the contact centre 3.2 List the organisational requirements and/or regulations about what can and cannot be expressed to customers verbally and/or in writing 3.3 State what information is best given to customers verbally and what is best given in writing 3.4 Explain the difference between positive and negative language when communicating with customers verbally and/or in writing 3.5 Explain how to demonstrate 'active listening'	

Unit 307 Contribute to performance management in a contact centre

UAN:	**A/503/0407**
Level:	Level 3
Credit value:	4
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 27.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to monitor individual and team performance in a contact centre, contribute to the enhancement of performance and understand performance management in a contact centre

Learning outcome	**The learner will:**
1 Be able to monitor individual and team performance in a contact centre	
Assessment criteria	
The learner can: 1.1 Agree with colleagues how performance will be monitored within the team to meet performance objectives 1.2 Carry out performance monitoring activities in accordance with organisational procedures 1.3 Identify shortfalls in performance against agreed objectives 1.4 Provide feedback to colleagues in a way that is motivating and identifies areas for improvement	

Learning outcome	**The learner will:**
2 Be able to contribute to the enhancement of performance in a contact centre	
Assessment criteria	
The learner can: 2.1 Devise practicable strategies for managing the pressure of workflow in operational bottlenecks 2.2 Provide support in accordance with organisational performance needs	

Learning outcome	The learner will:
3 Understand performance management in a contact centre	
Assessment criteria	
The learner can: 3.1 Describe the features and benefits of the products and/or services offered or supported by the contact centre 3.2 Describe the effect of organisational procedures and guidelines on contact centre operations 3.3 Explain the impact of regulations and legislation on contact centre operations 3.4 Explain the importance of performance management for achieving efficiency in contact centre operations 3.5 Explain the importance of providing feedback that is both motivational and identifies actions for performance improvement	

Unit 308 Support customers and colleagues when providing contact centre services

UAN:	**J/503/0426**
Level:	Level 3
Credit value:	5
GLH:	15
Relationship to NOS:	This unit is linked to Contact Centre NOS 32.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
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 outcome	**The learner will:**
1 Be able to communicate information about products and/or services to customers in a contact centre	
Assessment criteria	
The learner can: 1.1 Validate customers' identity in accordance with organisational procedures 1.2 Give customers an overview of products and/or services in accordance with organisational procedures for language and conversation 1.3 Resolve customers' problems and queries in a contact centre within their level of authority 1.4 Assist customers with decisions about products and/or services in accordance with organisational guidelines, relevant regulation or legislation 1.5 Refer customers to someone with greater authority when customers' requests or problems are beyond their level of authority 1.6 Record customer problems and complaints in accordance with organisational procedures	

Learning outcome	The learner will:
2 Be able to monitor compliance with organisational requirements for customer contacts	
Assessment criteria	
The learner can: 2.1 Monitor compliance with organisational requirements for customer contacts against agreed criteria 2.2 Deal with breaches of organisational requirements in accordance with organisational procedures	

Learning outcome	The learner will:
3 Be able to provide advice and support to colleagues in a contact centre	
Assessment criteria	
The learner can: 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 3.2 Provide support that increases colleagues' understanding of organisational requirements and constraints on customer contacts that is commensurate with their needs	

Learning outcome	The learner will:
4 Understand how to support colleagues and customers in a contact centre	
Assessment criteria	
The learner can: 4.1 Explain the effect of organisational and regulatory requirements on supporting colleagues and customers 4.2 Explain what constitutes non-compliance with legal and regulatory requirements and the implications of this 4.3 Describe different sources of information about the organisation's products and/or services 4.4 Explain how to update and maintain knowledge and understanding of products and/or services 4.5 Explain the organisational systems for identifying customers and related personal security matters 4.6 Explain how buddying and assisting colleagues with handling customer contacts increases understanding of organisational requirements	

Unit 309 Contribute to resource plan development in contact centre operations

UAN:	**L/503/0430**
Level:	Level 3
Credit value:	7
GLH:	38
Relationship to NOS:	This unit is linked to Contact Centre NOS 35.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to produce demand forecasts for contacts handled by contact centres, carry out scheduling and staffing activities and understand how to develop a resource plan for contact centre operations

Learning outcome	**The learner will:**
1 Be able to produce demand forecasts for contacts handled by contact centres	
Assessment criteria	
The learner can: 1.1 Identify the metrics that represent demand for contact centre services 1.2 Identify resource needs for contact centre staff from an analysis of demand 1.3 Predict demand for contact centre resources within agreed tolerances 1.4 Explain the reasons for anticipated changes in demand for contact centre resources	

Learning outcome	**The learner will:**
2 Be able to carry out scheduling and staffing activities in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify practicable options to address resource planning issues in consultation with colleagues 2.2 Brief colleagues on demand trends and forecasts, resource availability and their implications for meeting organisational objectives 2.3 Identify staff availability, preferences and constraints in context of	

business needs 2.4 Plan the deployment of staff to meet business needs and changing requirements

Learning outcome	**The learner will:**
3 Understand how to develop a resource plan for contact centre operations	
Assessment criteria	
The learner can: 3.1 Explain the impact of organisational requirement and regulation and legislation on contact centre operations 3.2 Explain the organisational procedures and guidelines relating to resourcing contact centre operations 3.3 Explain the importance of resource planning in the context of efficient contact centre operations 3.4 Explain different techniques for monitoring and analysing resource needs in a contact centre 3.5 Explain different techniques for predicting demand for contact centre resources 3.6 Explain the importance of using confidence limits in demand forecasts in contact centres 3.7 Explain how to use employee data and work records for resource planning purposes 3.8 Explain the importance of considering staff availability, constraints and preferences when scheduling work 3.9 Explain the importance of communication with colleagues about contact centre demand, resource availability and resource plans	

Unit 310 Manage incidents referred to a contact centre

UAN:	**K/503/0418**
Level:	Level 3
Credit value:	6
GLH:	30
Relationship to NOS:	This unit is linked to Contact Centre NOS 39.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to manage incidents through a contact centre, provide support to colleagues on incident management and understand management of incidents reported to a contact centre

Learning outcome	**The learner will:**
1 Be able to manage incidents through a contact centre	
Assessment criteria	
The learner can: 1.1 Respond to incoming contacts relating to incidents in accordance with organisational procedures 1.2 Select resources that are available to deal with reported incidents 1.3 Inform the selected personnel of their responsibilities in accordance with organisational procedures 1.4 Specify the action needed from personnel that are deployed to deal with the incident in accordance with organisational procedures 1.5 Monitor the management of the incident in accordance with organisational procedures 1.6 Ensure that the correct decision paths have been followed to manage reported incidents 1.7 Deal with queries and/or complaints about incident handling in accordance with organisational procedures	

Learning outcome	**The learner will:**
2 Be able to provide support to colleagues on incident management in a contact centre	
Assessment criteria	
The learner can: 2.1 Agree with colleagues the areas in which they need support and guidance in incident management	

2.2 Agree with colleagues the type of support that will provide them with support that is capable of meeting their identified needs 2.3 identify actions to improve team performance in incident handling from a review of incident management results

Learning outcome	**The learner will:**
3 Understand how to manage incidents reported to a contact centre	
Assessment criteria	
The learner can: 3.1 Explain the incident management services offered by the contact centre 3.2 Describe the strengths and weaknesses of methods of assessing the validity and priority of the potential incident 3.3 Explain the importance of clear communication using the most appropriate channel with those dealing with incidents 3.4 Describe the strengths and weaknesses of ways of monitoring the actions of those deployed to deal with the incident 3.5 Describe the strengths and weaknesses of different types of support for colleagues 3.6 Explain the importance of reviewing incident management results	

Unit 319* Manage own professional development within an organisation

This unit has been replaced by unit 619. Learners registered before 1st July 2017 should use this unit. Learners registered after 1st July 2017 should use unit 619.

UAN:	**L/600/9586**
Level:	Level 3
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LA2 Manage your own resources and professional development.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about learners managing own professional development in order to achieve work objectives, career and personal goals.

Learning outcome	**The learner will:**
1 Be able to assess own career goals and personal development	
Assessment criteria	
The learner can: 1.1 Identify career and personal goals 1.2 Assess how own career goals affect work role and professional development	

Learning outcome	**The learner will:**
2 Be able to set personal work objectives in line with organisational objectives	
Assessment criteria	
The learner can: 2.1 Agree SMART (Specific, Measurable, Achievable, Realistic and Time bound) personal work objectives in line with organisational objectives	

Learning outcome	The learner will:
3 Be able to produce a personal development plan	
Assessment criteria	
The learner can: 3.1 Identify gaps between objectives set and own current knowledge and skills 3.2 Produce a personal development plan	

Learning outcome	The learner will:
4 Be able to implement and monitor own personal development plan	
Assessment criteria	
The learner can: 4.1 Produce a plan for activities identified in personal development plan 4.2 Explain how to monitor and review own personal development plan	

Unit 401 Improve organisational effectiveness and personal development in a contact centre

UAN:	**R/503/0350**
Level:	Level 4
Credit value:	5
GLH:	10
Relationship to NOS:	This unit is linked to Contact Centre NOS 3.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to prepare individual and team development plans in a contact centre, organise feedback collection to support personal development and organisational effectiveness, promote and support actions to improve organisational effectiveness and understand the principles underpinning personal development and organisational effectiveness in a contact centre

Learning outcome	**The learner will:**
1 Be able to prepare individual and team development plans in a contact centre	
Assessment criteria	
The learner can: 1.1 Assess individual and team personal development against identified business needs 1.2 Identify common themes from an analysis of individual and team development needs 1.3 Identify existing development activities that are commensurate with identified development needs 1.4 Identify options for other activities that would meet identified development needs 1.5 Evaluate the strengths and weaknesses of sources of information about development activities relevant to contact centre operations 1.6 Approve individual and team development plans that meet the requirement	

Learning outcome	The learner will:
2 Be able to organise feedback collection to support personal development and organisational effectiveness in a contact centre	
Assessment criteria	
The learner can: 2.1 Organise opportunities for individuals and teams to obtain feedback without interruption to service 2.2 Enable individuals to have access to information about their personal development and organisational effectiveness needs 2.3 Identify opportunities for personal development and improvements in organisational effectiveness based on feedback 2.4 Confirm that feedback is current and relevant to the contact centre	

Learning outcome	The learner will:
3 Be able to promote and support actions to improve organisational effectiveness in contact centre operations	
Assessment criteria	
The learner can: 3.1 Encourage suggestions for improvements in organisational effectiveness 3.2 Make individuals aware of the procedures that will facilitate suggestions for improvements in contact centre operations 3.3 Prioritise suggestions for improvements in contact centre operations 3.4 Make recommendations for improvements in contact centre operations in accordance with organisational procedures	

Learning outcome	The learner will:
4 Understand the principles underpinning personal development and organisational effectiveness in a contact centre	
Assessment criteria	
The learner can: 4.1 Describe the products and/or services offered or supported by the contact centre 4.2 Explain the requirements of contact centre operational procedures and guidelines 4.3 Explain the regulation and legislation that have an impact on contact centre operations 4.4 Explain the strengths and weaknesses of techniques to assess team and individual personal development needs 4.5 Explain the importance of prioritising actions which encourage suggestions for improvements in contact centre operations	

Unit 402 Manage health and safety procedures in a contact centre

UAN:	**A/503/0357**
Level:	Level 4
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to Contact Centre NOS 6.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to review health and safety procedures in a contact centre, implement actions to enhance health and safety procedures and understand the principles underpinning health and safety in a contact centre

Learning outcome	**The learner will:**
1 Be able to review health and safety procedures in a contact centre	
Assessment criteria	
The learner can: 1.1 Establish the effectiveness of organisational procedures for health and safety 1.2 Identify options for improving health and safety procedures 1.3 Analyse the benefits and drawbacks of each option for the enhancement of health and safety procedures 1.4 Present recommendations for the enhancement of health and safety procedures by the agreed method	

Learning outcome	**The learner will:**
2 Be able to implement actions to enhance health and safety procedures in a contact centre	
Assessment criteria	
The learner can: 2.1 Develop a plan that addresses areas identified for enhancement 2.2 Brief colleagues who are responsible for implementing the plan as to the likely effects on contact centre operations 2.3 Communicate the plan to everyone who may be affected 2.4 Meet the timescale of the implementation plan 2.5 Review the effectiveness of the implementation against its objectives	

2.6 Make recommendations for adjustments to the plan and/or procedures following an analysis of the implementation

Learning outcome	**The learner will:**
3 Understand the principles underpinning health and safety in a contact centre	
Assessment criteria	
The learner can: 3.1 Explain organisational health and safety systems and procedures 3.2 Explain the importance of matching operational needs of a contact centre with health and safety requirements 3.3 Evaluate the benefits and drawbacks of proposed actions to enhance health and safety procedures 3.4 Justify what needs to be included in a plan to implement enhancements to health and safety 3.5 Explain the importance of monitoring the effects of enhancements to health and safety procedures	

Unit 403 Manage the use of contact centre systems and technology

UAN:	**R/503/0378**
Level:	Level 4
Credit value:	6
GLH:	20
Relationship to NOS:	This unit is linked to Contact Centre NOS 11.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to manage the use of contact centre systems and technology operations, modify contact centre system parameters to optimise performance, develop policy for continuity and ongoing development of contact centre systems and understand management of contact centre systems and technology

Learning outcome	**The learner will:**
1 Be able to manage the use of contact centre systems and technology operations	
Assessment criteria	
The learner can: 1.1 Use agreed performance metrics to monitor the efficiency of the systems 1.2 Monitor the production of routine and specialist reports according to organisational guidelines 1.3 Identify opportunities to enhance system performance from an analysis of monitoring reports and performance metrics 1.4 Identify options for enhancements to the system configuration that are capable of improving business performance 1.5 Implement configuration parameter changes in accordance with organisational procedures 1.6 Manage contacts efficiently by using predictive contact queuing rules according to organisational guidelines	

Learning outcome	The learner will:
2 Be able to modify contact centre system parameters to optimise performance	
Assessment criteria	
The learner can: 2.1 Establish contact priorities by setting routing rules that meet customer expectations and organisational guidelines 2.2 Evaluate the benefits and drawbacks of different routing parameters against agreed criteria 2.3 Analyse the effects of alterations to applications and systems against agreed criteria	

Learning outcome	The learner will:
3 Be able to develop policy for continuity and ongoing development of contact centre systems	
Assessment criteria	
The learner can: 3.1 Develop operational continuity plans for systems in accordance with organisational processes and procedures and rules and regulations and the results of risk assessments for any proposed changes 3.2 Gain agreement to the operational continuity policy and plans	

Learning outcome	The learner will:
4 Understand the management of contact centre systems and technology	
Assessment criteria	
The learner can: 4.1 Explain the service offer of the contact centre and the boundaries placed on that offer 4.2 Explain the impact of regulation and legislation on contact centre operations, systems and technology 4.3 Explain how to design performance metrics that are clear indicators of efficiency in contact centre operations 4.4 Explain how to use the results of risk assessments of systems and technology	

Unit 404 Manage customer service delivery in a contact centre

UAN:	**A/503/0388**
Level:	Level 4
Credit value:	6
GLH:	10
Relationship to NOS:	This unit is linked to Contact Centre NOS 16.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to manage escalation processes for difficult customer service issues in a contact centre, manage the monitoring of customer service performance and feedback, review organisational and regulatory requirements for customer service delivery and understand the management of customer service in contact centres

Learning outcome	**The learner will:**
1 Be able to manage escalation processes for difficult customer service issues in a contact centre	
Assessment criteria	
The learner can: 1.1 Agree authority boundaries for staff at all levels who deal with customer issues or complaints 1.2 Resolve customer issues or complaints referred from colleagues (including high risk or high profile customers) in accordance with organisational procedures 1.3 Identify practicable ways of preventing recurrences of customer service issues	

Learning outcome	**The learner will:**
2 Be able to manage the monitoring of customer service performance and feedback in a contact centre	
Assessment criteria	
The learner can: 2.1 Design Key Performance Indicators (KPIs) that are capable of measuring customer service performance 2.2 Gain approval to KPIs 2.3 Coordinate monitoring activities to test the quality of customer	

service against agreed KPIs 2.4 Analyse the results of monitoring data about customer service against organisational and regulatory requirements 2.5 Develop enhancements to monitoring procedures for customer service performance

Learning outcome	**The learner will:**
3 Be able to review organisational and regulatory requirements for customer service delivery in a contact centre	
Assessment criteria	
The learner can: 3.1 Evaluate the impact of existing organisational and regulatory requirements on customer service delivery in the contact centre 3.2 Recommend enhancements to organisational strategies and policies to meet regulatory requirements in customer service delivery 3.3 Communicate changes in organisational customer service procedures that meet regulatory requirements	

Learning outcome	**The learner will:**
4 Understand the management of customer service in contact centres	
Assessment criteria	
The learner can: 4.1 Evaluate the implications for customer service of the organisation's products and/or services offered or supported by the contact centre 4.2 Explain organisational and regulatory requirements of customer service delivery in the contact centre 4.3 Evaluate the impact of the organisation's customer service aims and objectives on the service offer of the contact centre 4.4 Explain how a customer or problem may become high risk or high profile 4.5 Explain the importance of supporting team leaders and managers in reinforcing the escalation and complaints procedures	

Unit 405 Manage direct sales activities in a contact centre

UAN:	**H/503/0398**
Level:	Level 4
Credit value:	6
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 21.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to review the use of sales information and sales techniques in a contact centre, develop plans for direct sales, develop individual and team sales performance and understand the management of sales activities in a contact centre

Learning outcome	**The learner will:**
1 Be able to review the use of sales information and sales techniques in a contact centre	
Assessment criteria	
The learner can: 1.1 Organise spot checks of how sales information is gathered and sales techniques are used in accordance with organisational guidelines 1.2 Collate the results of sales monitoring processes to enable analysis 1.3 Identify possible enhancements to customer information collection and/or sales techniques	

Learning outcome	**The learner will:**
2 Be able to develop plans for direct sales in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify sales patterns and trends from an analysis of sales data 2.2 Identify areas for enhancement in sales activities from an analysis of sales data 2.3 Report the findings of the analysis to colleagues in the agreed format 2.4 Identify actions to be undertaken including allocating roles and responsibilities 2.5 Implement the agreed plans to enhance sales performance in accordance with organisational procedures	

Learning outcome	The learner will:
3 Be able to develop individual and team sales performance in a contact centre	
Assessment criteria	
The learner can: 3.1 Identify collective skills needs for direct sales from an analysis of sales data 3.2 Identify team members' existing skills and knowledge from an analysis of sales data 3.3 Identify team members' development needs from an analysis of sales data 3.4 Agree personal and team development plans that are commensurate with the analysis 3.5 Implement the agreed actions in accordance with the team and individual development plans	

Learning outcome	The learner will:
4 Understand the management of sales activities in a contact centre	
Assessment criteria	
The learner can: 4.1 Evaluate the impact of regulations and legislation on the management of sales activities through contact centres 4.2 Evaluate the components of a sales plan against agreed criteria 4.3 Explain how to create and implement team and individual development plans for sales skills in a contact centre	

Unit 406 Coordinate customer communication processes in a contact centre

UAN:	**T/503/0406**
Level:	Level 4
Credit value:	6
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 26.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to develop customer communication policies in a contact centre, support the development of customer service procedures and guidelines for use by front line colleagues in a contact centre, enhance customer service through effective customer communication and understand the principles of managing communication with customers in a contact centre

Learning outcome	**The learner will:**
1 Be able to develop customer communication policies in a contact centre	
Assessment criteria	
The learner can: 1.1 Evaluate the costs and benefits of different media options for communicating with customers 1.2 Draft customer communication policies that fit organisational and customer service objectives 1.3 Gain management agreement to the customer communication policies	

Learning outcome	**The learner will:**
2 Be able to support the development of customer service procedures and guidelines for use by front line colleagues in a contact centre	
Assessment criteria	
The learner can: 2.1 Ensure that customer service procedures and guidelines reflect customer service objectives	

2.2 Evaluate the compliance of the draft procedures and guidelines with the customer communication policy 2.3 Reconcile customer communication policy with draft procedures and guidelines

Learning outcome	**The learner will:**
3 Be able to enhance customer service through effective customer communication in a contact centre	
Assessment criteria	
The learner can: 3.1 Identify teams' and individuals' areas for development in customer communication skills 3.2 Implement action to enhance team and individual communications skills that meet identified needs 3.3 Evaluate the effectiveness of skills development activities against communications policy objectives	

Learning outcome	**The learner will:**
4 Understand the principles of managing communication with customers in a contact centre	
Assessment criteria	
The learner can: 4.1 Evaluate the products and/or services offered by or supported by the contact centre 4.2 Explain the impact of regulations and legislation on managing customer communication 4.3 Evaluate the components of a customer communication policy 4.4 Evaluate different methods for developing team and individual communications skills	

Unit 407 Manage team and individual performance in contact centre operations

UAN:	**F/503/0408**
Level:	Level 4
Credit value:	5
GLH:	15
Relationship to NOS:	This unit is linked to Contact Centre NOS 28.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to organise performance-based feedback for contact centre colleagues, organise team and individual performance enhancement activities, manage organisational change and employee retention and understand the management of performance in a contact centre

Learning outcome	**The learner will:**
1 Be able to organise performance-based feedback for contact centre colleagues	
Assessment criteria	
The learner can: 1.1 Identify a range of routes for obtaining feedback on performance in contact centre operations 1.2 Allocate responsibility for contact centre performance management in a way that makes optimum use of resources 1.3 Obtain usable feedback on performance from a range of sources	

Learning outcome	**The learner will:**
2 Be able to organise team and individual performance improvement activities for contact centre colleagues	
Assessment criteria	
The learner can: 2.1 Identify opportunities for improvement from an analysis of feedback 2.2 Agree strategies for team building and the improvement of team and individual performance that are capable of meeting identified objectives 2.3 Monitor the progress of improvement activities and their effect against agreed objectives	

Learning outcome	The learner will:
3 Be able to manage organisational change in contact centre operations	
Assessment criteria	
The learner can: 3.1 Develop procedures and guidelines that address the area(s) of operations that are subject to change 3.3 Organise a programme of buddying and coaching support that supports the organisational change 3.4 Obtain formal and informal feedback on work satisfaction and the reason for resignations 3.5 Provide practicable advice to management on the steps that can be taken to improve staff retention	

Learning outcome	The learner will:
4 Understand the management of performance in a contact centre	
Assessment criteria	
The learner can: 4.1 Evaluate the impact of organisational procedures and guidelines for contact centre operations on team and individual performance 4.2 Explain the importance of ensuring that performance management activities become part of day to day work and management 4.3 Explain how staff turnover can be mitigated through management actions 4.4 Explain the factors that influence staff retention	

Unit 408 Maintain customer support operations in a contact centre

UAN:	**L/503/0427**
Level:	Level 4
Credit value:	5
GLH:	8
Relationship to NOS:	This unit is linked to Contact Centre NOS 33.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to review customer contact activities in a contact centre, deal with customer complaints about customer contacts and/or products and/or services, ensure compliance with organisational regulatory requirements and understand the management of customer support operations in a contact centre

Learning outcome	**The learner will:**
1 Be able to review customer contact activities in a contact centre	
Assessment criteria	
The learner can: 1.1 Carry out spot checks of customer contacts in accordance with organisational guidelines 1.2 Carry out audits of working practices relating to customer contact activities in accordance with organisational guidelines 1.3 Take action to address areas identified as needing enhancement	

Learning outcome	**The learner will:**
2 Be able to deal with customer complaints about customer contacts and/or products and/or services	
Assessment criteria	
The learner can: 2.1 Establish the nature of complaints in accordance with organisational guidelines 2.2 Explain the advantages and disadvantages of identified options 2.3 Agree the optimum option with the customer that meets their needs 2.4 Record the closure of the complaint in accordance with organisational guidelines 2.5 Identify learning points from an analysis of complaints	

Learning outcome	The learner will:
3 Be able to ensure compliance with organisational and regulatory requirements in a contact centre	
Assessment criteria	
The learner can: 3.1 Confirm the organisational and regulatory requirements relating to customer contact activities 3.2 Establish the risks of non-compliance with requirements relating to customer contact activities 3.3 Take action to address activities identified as non-compliant	

Learning outcome	The learner will:
4 Understand the management of customer support in a contact centre	
Assessment criteria	
The learner can: 4.1 Explain the organisational procedures and guidelines and regulations and legislation relevant to organisational customer contact activities 4.2 Explain the plans for customer service audits 4.3 Explain the impact of organisational aims on customer contact 4.4 Analyse organisational customer complaints referral process 4.5 Explain the importance of keeping comprehensive records of customer problems and complaints and how they have been resolved 4.6 Analyse different techniques for identifying and evaluating options for dealing with customer problems and complaints	

Unit 409 Manage resource planning and improvement of resource allocation in a contact centre

UAN:	**F/503/0425**
Level:	Level 4
Credit value:	6
GLH:	20
Relationship to NOS:	This unit is linked to Contact Centre NOS 36.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to develop organisational approaches to demand forecasting in a contact centre, allocate resources to meet demand, contribute to the development of resource policies and understand the management of resource plans for contact centre operations

Learning outcome	**The learner will:**
1 Be able to develop organisational approaches to demand forecasting in a contact centre	
Assessment criteria	
The learner can: 1.1 Identify the organisational strategy and objectives that provide pointers to future demand 1.2 Assess the suitability of demand forecasting tools and the use of confidence limits for organisational objectives 1.3 Adapt demand forecasting methods to meet specified requirements	

Learning outcome	**The learner will:**
2 Be able to allocate resources to meet demand in a contact centre	
Assessment criteria	
The learner can: 2.1 Identify the resources needed for contact centre operations from an analysis of demand 2.2 Identify the availability of suitable resources for deployment in contact centre operations 2.3 Allocate resources in a way that optimise efficiency within the constraints	

Learning outcome	The learner will:
3 Be able to contribute to the development of resource policies in a contact centre	
Assessment criteria	
The learner can: 3.1 Identify the strengths and weaknesses of current organisational resource policies in terms of the ability to achieve organisational objectives 3.2 Confirm any need for any changes to organisational resource policies with colleagues 3.3 Recommend changes to organisational resource policies that would improve efficiency in contact centre operations	

Learning outcome	The learner will:
4 Understand the management of resource plans for contact centre operations	
Assessment criteria	
The learner can: 4.1 Analyse the impact of organisational requirement and regulation and legislation on contact centre operations 4.2 Evaluate the impact of organisational procedures and guidelines relating to resourcing contact centre operations 4.3 Explain the organisational strategies and objectives that may have an impact on resourcing contact centre operations 4.4 Explain the uses of confidence limits in demand forecasting 4.5 Explain the importance of reaching agreement with colleagues on the allocation of resources in contact centres 4.6 Explain the influence of resource allocation on business efficiency	

Unit 410 Manage Incident Management Systems in a contact centre

UAN:	**H/503/0417**
Level:	Level 4
Credit value:	6
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 40.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to ensure the effective management of incidents through a contact centre, contribute to the development of organisational strategy for incident management and understand the management of incidents reported to a contact centre

Learning outcome	**The learner will:**
1 Be able to ensure the effective management of incidents through a contact centre	
Assessment criteria	
The learner can: 1.1 Ensure compliance with organisational procedures for handling reported incidents through an analysis of incident handling against agreed criteria 1.2 Use feedback to identify areas for enhancements to incident management systems 1.3 Identify metrics that measure changes in performance in incident handling 1.4 Use the findings of reviews to make recommendations for the enhancement of performance in accordance with organisational procedures 1.5 Implement agreed changes in accordance with organisational procedures	

Learning outcome	The learner will:
2 Be able to contribute to the development of organisational strategy for incident management through a contact centre	
Assessment criteria	
The learner can: 2.1 Use an analysis of evidence to establish the need for changes in incident management handling 2.2 Develop recommendations for the ongoing review of organisational strategy for handling incidents in incident management 2.3 Ensure that the revised strategy meets organisational objectives	

Learning outcome	The learner will:
3 Understand the management of incidents reported to a contact centre	
Assessment criteria	
The learner can: 3.1 Explain the incident management services offered by the contact centre 3.2 Evaluate the strengths and weaknesses of methods of monitoring contact handling which leads to incident management 3.3 Evaluate the efficiency of techniques for analysing data and metrics relating to the handling of contacts which lead to incident management 3.4 Evaluate methods of assessing the effectiveness of incident management against agreed criteria 3.5 Explain the importance of defining the boundaries of procedures dealing with incident management and contact centre responsibilities 3.6 Explain the importance of consultation with colleagues regarding possible changes in procedures 3.7 Explain the organisational strategy relevant to incident management by the contact centre	

Unit 501 Develop health and safety policy and procedures in a contact centre

UAN:	**J/503/0359**
Level:	Level 5
Credit value:	7
GLH:	20
Relationship to NOS:	This unit is linked to Contact Centre NOS 7.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to develop a strategy for health and safety in a contact centre, support the development of health and safety policy and procedures and understand the principles underpinning health and safety policy in contact centre operations

Learning outcome	**The learner will:**
1 Be able to develop a strategy for health and safety in a contact centre	
Assessment criteria	
The learner can: 1.1 Define the strategic requirements for formal risk assessments, health and safety procedures and audits which comply with regulations and meet operational needs 1.2 Identify the business areas that must be served by health and safety procedures 1.3 Monitor the use of health and safety procedures for risk assessments and health and safety audits in accordance with the compliance plan 1.4 Identify the need for changes which meet contact centre business needs from an analysis of the results of health and safety compliance monitoring 1.5 Evaluate the benefits and drawbacks of changes to health and safety policy 1.6 Develop a strategy for health and safety in accordance with organisational requirements	

Learning outcome	The learner will:
2 Be able to support the development of health and safety policy and procedures in contact centre operations	
Assessment criteria	
The learner can: 2.1 Develop health and safety policies and procedures that meet identified requirements, taking colleagues' views into account 2.2 Prepare a business case supporting the need for change or maintaining the status quo which is supported by evidence 2.3 Negotiate the adoption of those changes that need to be made to health and safety policies procedures with minimum disruption to business	

Learning outcome	The learner will:
3 Understand the principles underpinning health and safety policy in contact centre operations	
Assessment criteria	
The learner can: 3.1 Evaluate the impact of health and safety regulations and legislation relevant to contact centres 3.2 Explain the basis for the design of organisational health and safety policies and procedures 3.3 Explain the organisation's business aims and needs that may be affected by health and safety policies and procedures 3.4 Explain the components of a health and safety audit 3.5 Explain the characteristics of an effective audit 3.6 Explain the importance of balancing health and safety requirements with contact centre business needs 3.7 Explain the strengths and weaknesses of techniques for negotiating policy changes to health and safety	

Unit 502 Develop strategy for contact centre systems and technology

UAN:	**L/503/0380**
Level:	Level 5
Credit value:	7
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 12.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to develop strategy for contact centre systems and technology, develop organisational policy to ensure operational continuity for contact centre systems and technology and understand the strategic implications of contact centre systems and technology capability

Learning outcome	**The learner will:**
1 Be able to develop strategy for contact centre systems and technology	
Assessment criteria	
The learner can: 1.1 Identify the aspects of business strategy that are influenced by systems and technology 1.2 Develop a strategy that meets current and anticipated requirements of contact centre systems 1.3 Ensure the strategy complements the contact centre's business strategy through consultation with colleagues	

Learning outcome	**The learner will:**
2 Be able to develop organisational policy to ensure operational continuity for contact centre systems and technology	
Assessment criteria	
The learner can: 2.1 Identify the policy drivers that result from systems and technology strategy and operational requirements 2.2 Evaluate the risks associated with breaches of operational continuity resulting from systems or technology failure 2.3 Identify risk mitigation measures that are commensurate with the degree of risk	

2.4 Develop organisational policy for systems in accordance with organisational standards 2.5 Secure commitment to the policy through consultation with colleagues

Learning outcome	**The learner will:**
3 Understand the strategic implications of contact centre systems and technology capability	
Assessment criteria	
The learner can: 3.1 Evaluate organisational procedures and guidelines and the structure of contact centre tasks that are affected by operational continuity issues and business strategy 3.2 Evaluate the impact of regulation and legislation on the options for contact centre strategy and policy 3.3 Explain the decision-making process in agreeing strategies and policies for systems and technologies 3.4 Explain the advantages and disadvantages of different options for mitigating the risks associated with system failure 3.5 Explain the strategic importance of linking the systems and technology and business strategy	

Unit 503 Develop customer service procedures for use in a contact centre

UAN:	**A/503/0391**
Level:	Level 5
Credit value:	6
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 17.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre, develop procedures for customer service and understand the development of customer service procedures in contact centres

Learning outcome	**The learner will:**
1 Be able to set organisational aims and objectives that have an impact on customer service delivery in a contact centre	
Assessment criteria	
The learner can: 1.1 Assess the contribution of contact centre operations to the achievement of organisational business objectives 1.2 Develop the contact centre's service offer and its limits to meet organisational objectives 1.3 Use customer classification to define service standards in a contact centre that meet organisational objectives	

Learning outcome	**The learner will:**
2 Be able to develop procedures for customer service through a contact centre	
Assessment criteria	
The learner can: 2.1 Produce design options for customer service procedures that are consistent with agreed requirements and budgets 2.2 Consult relevant people when developing different design options 2.3 Ensure the design options conform with legal requirements and with any organisational strategy and policy for customer service	

2.4 Ensure design options take account of stakeholders' needs 2.5 Confirm the fitness for purpose of proposed procedures and guidelines following a trial

Learning outcome	**The learner will:**
3 Understand the development of customer service procedures in contact centres	
Assessment criteria	
The learner can: 3.1 Evaluate the impact of organisational and regulatory requirements on customer service delivery in the contact centre 3.2 Explain the link between the organisation's customer service aims and objectives and the service offer(s) of the contact centre 3.3 Explain how to define a service offer for a customer 3.4 Explain how to trial draft customer service procedures and guidelines	

Unit 504 Manage direct sales operations in a contact centre

UAN:	**Y/503/0401**
Level:	Level 5
Credit value:	7
GLH:	30
Relationship to NOS:	This unit is linked to Contact Centre NOS 22.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to contribute to the development of organisational sales strategy in a contact centre, develop procedures and guidelines to be used for direct sales, review sales planning, analysis and reporting techniques for direct sales and understand the principles underpinning direct sales activities in a contact centre

Learning outcome	**The learner will:**
1 Be able to contribute to the development of organisational sales strategy in a contact centre	
Assessment criteria	
The learner can: 1.1 Identify the features of organisational sales strategy that have an impact on direct sales operations 1.2 Recommend developments to the sales strategy that are capable of enhancing sales performance	

Learning outcome	**The learner will:**
2 Be able to develop procedures and guidelines to be used for direct sales through a contact centre	
Assessment criteria	
The learner can: 2.1 Assess the importance of sales information that is needed to achieve the sales objectives 2.2 Confirm that the required sales information can be collected with minimum disruption to sales activities 2.3 Define the sales style and techniques to be used to achieve direct sales objectives	

2.4 Confirm the fitness for purpose of the draft procedures and guidelines through a test and trial

Learning outcome	**The learner will:**
3 Be able to review sales planning, analysis and reporting techniques for direct sales through a contact centre	
Assessment criteria	
The learner can: 3.1 Review current sales plans and methods of devising them from an analysis of customer, market and sales information against agreed criteria 3.2 Identify the actions needed to achieve sales objectives and plans 3.3 Design sales analysis tools that are capable of monitoring sales and enhancing performance 3.4 Implement the agreed actions to enhance performance in accordance with the sales plan 3.5 Define sales reporting requirements that are capable of capturing the required monitoring and sales performance information	

Learning outcome	**The learner will:**
4 Understand the principles underpinning direct sales activities in a contact centre	
Assessment criteria	
The learner can: 4.1 Evaluate the strategic implications of the range of products and/or services covered by contact centre direct sales 4.2 Evaluate current organisational approaches and systems for direct sales 4.3 Evaluate the impact of regulation and legislation on direct sales operations 4.4 Explain how to specify sales analysis requirements 4.5 Evaluate the implications of the options for sales monitoring tools 4.6 Evaluate how an organisational sales strategy drives direct sales operations	

Unit 505 Develop and enhance performance management in a contact centre

UAN:	**A/503/0410**
Level:	Level 5
Credit value:	6
GLH:	16
Relationship to NOS:	This unit is linked to Contact Centre NOS 29.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to develop and implement a system for performance-based feedback in a contact centre, develop a performance management system, direct the strategic plan for change management and understand strategies for the enhancement of performance management systems in a contact centre

Learning outcome	**The learner will:**
1 Be able to develop a system for performance-based feedback in a contact centre	
Assessment criteria	
The learner can: 1.1 Evaluate methods of obtaining and sharing feedback on performance against agreed criteria 1.2 Develop practicable recommendations for improvements to the use of feedback on performance in the delivery of contact centre services 1.3 Ensure that the system is capable of delivering the agreed objectives	

Learning outcome	**The learner will:**
2 Be able to develop and implement a performance management system in a contact centre	
Assessment criteria	
The learner can: 2.1 Evaluate features of existing performance management metrics and systems that deliver the required management information 2.2 Use feedback from colleagues to develop a performance management strategy that will meet agreed organisational strategies and objectives	

2.3 Evaluate options for enhancements in performance management systems against agreed criteria 2.4 Implement the performance management strategy in accordance with the plan 2.5 Monitor the efficiency of the performance management strategy in delivering the organisational strategy and systems

Learning outcome	**The learner will:**
3 Be able to direct the strategic plan for change management in contact centre operations	
Assessment criteria	
The learner can: 3.1 Establish the likely impact on operations of identified changes 3.2 Devise a change management plan that is capable of managing the strategy for change 3.3 Monitor changes in staff retention numbers and patterns 3.4 Identify practicable management options for improving work satisfaction	

Learning outcome	**The learner will:**
4 Understand strategies for the development and enhancement of performance management systems in a contact centre	
Assessment criteria	
The learner can: 4.1 Evaluate the impact of organisational procedures and regulation on contact centre operations, products and services 4.2 Evaluate the factors involved in developing, enhancing and implementing a performance management strategy for a contact centre against agreed criteria 4.3 Evaluate different methods of monitoring performance management systems and strategies against organisational strategy 4.4 Explain the strengths and weaknesses of techniques for managing contact centre teams operating under pressure	

Unit 506 Manage the provision of customer support through a contact centre

UAN:	**Y/503/0429**
Level:	Level 5
Credit value:	5
GLH:	14
Relationship to NOS:	This unit is linked to Contact Centre NOS 34.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to link organisational strategy and customer systems and guidelines in a contact centre, review customer service provision, ensure compliance with organisational and regulatory requirements during customer contacts and understand the management of customer support operations in a contact centre

Learning outcome	**The learner will:**
1 Be able to link organisational strategy to customer systems and guidelines in a contact centre	
Assessment criteria	
The learner can: 1.1 Explain how strategic aims have an impact on customer support for products and/or services 1.2 Identify aspects of customer systems and guidelines that may benefit from a review	

Learning outcome	**The learner will:**
2 Be able to review customer service provision in a contact centre	
Assessment criteria	
The learner can: 2.1 Analyse current performance through a comparison of actual performance against expectations set out in organisational systems and guidelines 2.2 Ensure the review covers customer identification and security, communication and dealing with problems and complaints, staff motivation and competence	

2.3 Identify actions to enhance customer service that are commensurate with identified needs

Learning outcome	**The learner will:**
3 Be able to ensure compliance with organisational and regulatory requirements during customer contacts	
Assessment criteria	
The learner can: 3.1 Identify organisational and regulatory requirements that have an impact on customer contact activities 3.2 Establish the probability and consequences of non-compliance with organisational or regulatory requirements 3.3 Define checks that test compliance with organisational and regulatory requirements that are capable of meeting objectives 3.4 Implement compliance testing checks in accordance with the plan 3.5 Take action to address shortfalls in compliance with customer contact activity requirements that are commensurate with identified needs	

Learning outcome	**The learner will:**
4 Understand the management of customer support operations in a contact centre	
Assessment criteria	
The learner can: 4.1 Evaluate the scope and effectiveness of organisational aims relevant to customer support 4.2 Evaluate the impact of regulation and legislation on customer support 4.3 Evaluate the efficiency of the process for reviewing and developing customer service systems and support 4.4 Evaluate different methods of developing staff skills to ensure the delivery of effective customer support in a contact centre 4.5 Explain the strengths and weaknesses of different risk assessment techniques applied to compliance risks in a contact centre 4.6 Explain how to assess probability and consequences of risk 4.7 Evaluate the effectiveness of different options to mitigate compliance risk 4.8 Explain why systems and guidelines may benefit from a review of efficiency	

Unit 507 Coordinate resource planning strategy in a contact centre

UAN:	**T/503/0423**
Level:	Level 5
Credit value:	6
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 37.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to enhance contact centre strategy in terms of demand and resource implications, define organisational policies for resource management and understand resource management strategies for contact centre operations

Learning outcome	**The learner will:**
1 Be able to enhance contact centre strategy in terms of demand and resource implications	
Assessment criteria	
The learner can: 1.1 Evaluate the impact of business strategies on resourcing policies 1.2 Evaluate the effectiveness of demand forecasting tools in use against agreed criteria 1.3 Agree with colleagues the way in which resourcing policies, associated techniques and resourcing communication methods need to be enhanced 1.4 Implement any agreed changes in demand forecasting and resourcing communications in accordance with the plan	

Learning outcome	**The learner will:**
2 Be able to define organisational policies for resource management for contact centre operations	
Assessment criteria	
The learner can: 2.1 Identify the extent to which resourcing, scheduling and staffing policies meet organisational strategy or objectives 2.2 Build colleagues' feedback into plans for enhancements to resource management strategies	

2.3 Ensure that organisational resourcing, scheduling and staffing policies meet identified objectives

Learning outcome	**The learner will:**
3 Understand resource management strategies for contact centre operations	
Assessment criteria	
The learner can: 3.1 Evaluate the impact of regulation and legislation on contact centre operations and resourcing 3.2 Explain the importance of matching demand forecasts with organisational strategy 3.3 Explain the importance and role of colleagues in reviewing and updating resource planning and management development 3.4 Evaluate the strengths and weaknesses of techniques for communicating demand forecasts and resource plans to contact centre staff 3.5 Explain the links between demand forecasting, resource planning and staffing requirements in a contact centre	

Unit 508 Develop strategy for incident management by a contact centre

UAN:	**R/503/0414**
Level:	Level 5
Credit value:	7
GLH:	12
Relationship to NOS:	This unit is linked to Contact Centre NOS 41.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Cfa, the Sector Skills Council for Administration
Aim:	This unit concerns being able to develop organisational strategy for incident management through a contact centre, develop organisational procedures for incident management and understand the development of strategy for incident management through a contact centre

Learning outcome	**The learner will:**
1 Be able to develop organisational strategy for incident management through a contact centre	
Assessment criteria	
The learner can: 1.1 Establish the implications of linking incident management strategy and organisational strategy 1.2 Ensure the incident management strategy informs organisational policies and procedures 1.3 Communicate the requirements of the strategy to everyone who will be affected by it	

Learning outcome	**The learner will:**
2 Be able to develop organisational procedures for incident management through a contact centre	
Assessment criteria	
The learner can: 2.1 Convert incident management strategic objectives into viable operational objectives and work flows 2.2 Use colleagues' feedback in the design of organisational procedures relating to incident management 2.3 Ensure incident management procedures include checks to ensure they are followed	

2.4 Run a test prior to achieving agreement to ensure the fitness for purpose of the procedures 2.5 Monitor the effectiveness of the incident management procedures against agreed criteria 2.6 Use an analysis of monitoring data to make recommendations for the enhancement of incident management procedures

Learning outcome	**The learner will:**
3 Understand the development of strategy for incident management through a contact centre	
Assessment criteria	
The learner can: 3.1 Define the strategic aims of the incident management service offered by the contact centre 3.2 Evaluate the impact of regulation or legislation on incident management through a contact centre 3.3 Evaluate the impact of the incident management strategy 3.4 Evaluate techniques for defining the strategic aims of contact centre operations 3.5 Explain the importance of consulting colleagues about the practicality of strategies that might be proposed 3.6 Explain the importance of including checks in procedures to ensure that they are followed 3.7 Evaluate the strengths and weaknesses of methods of testing procedures against agreed criteria	

Unit 619** Manage own professional development within an organisation

This unit has replaced unit 319. Learners registered before 1st July 2017 should use unit 319. Learners registered after 1st July 2017 should use this unit.

UAN:	**A/615/8558**
Level:	Level 3
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LA2 Manage your own resources and professional development.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about learners managing own professional development in order to achieve work objectives, career and personal goals.

Learning outcome	**The learner will:**
1 Be able to assess own career goals and personal development	
Assessment criteria	
The learner can: 1.1 Identify career and personal goals 1.2 Assess how own career goals affect work role and professional development	

Learning outcome	**The learner will:**
2 Be able to set personal work objectives in line with organisational objectives	
Assessment criteria	
The learner can: 2.1 Agree SMART (Specific, Measurable, Achievable, Realistic and Time bound) personal work objectives in line with organisational objectives	

Learning outcome	The learner will:
3 Be able to produce a personal development plan	
Assessment criteria	
The learner can: 3.1 Identify gaps between objectives set and own current knowledge and skills 3.2 Produce a personal development plan	

Learning outcome	The learner will:
4 Be able to implement and monitor own personal development plan	
Assessment criteria	
The learner can: 4.1 Produce a plan for activities identified in personal development plan 4.2 Explain how to monitor and review own personal development plan	

Appendix 1 Relationships to other qualifications

Links to other qualifications

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

These qualifications have connections to the:

- NVQs in Customer Service (4430)
- VRQs in Marketing (7734)
- NVQs in Sales (6801)
- VRQs in Contact Centre Skills (3411)

Literacy, language, numeracy and ICT skills development

These qualifications can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see **www.cityandguilds.com/functionalskills**
- Essential Skills (Northern Ireland) – see **www.cityandguilds.com/essentialskillsni**
- Essential Skills Wales (from September 2010).

Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Events**: dates and information on the latest Centre events
- **Online assessment**: information on how to register for GOLA/e-volve assessments.

City & Guilds

Skills for a brighter future

www.cityandguilds.com

Useful contacts

UK learners **General qualification information**	**T: +44 (0)844 543 0033** **E: learnersupport@cityandguilds.com**
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, GOLA/e-volve, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

Every effort has been made to ensure that the information contained in this publication is true and correct at the time of going to press. However, City & Guilds' products and services are subject to continuous development and improvement and the right is reserved to change products and services from time to time. City & Guilds cannot accept liability for loss or damage arising from the use of information in this publication.

If you have a complaint, or any suggestions for improvement about any of the services that we provide, email:

feedbackandcomplaints@cityandguilds.com

About City & Guilds

As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

Copyright

The content of this document is, unless otherwise indicated, © City & Guilds Limited and may not be copied, reproduced or distributed without prior written consent. However, approved City & Guilds centres and candidates studying for City & Guilds qualifications may photocopy this document free of charge and/or include a PDF version of it on centre intranets on the following conditions:

• centre staff may copy the material only for the purpose of teaching candidates working towards a City & Guilds qualification, or for internal administration purposes

• candidates may copy the material only for their own use when working towards a City & Guilds qualification

The Standard Copying Conditions (see the City & Guilds website) also apply.

Please note: National Occupational Standards are not © City & Guilds Limited. Please check the conditions upon which they may be copied with the relevant Sector Skills Council. Published by City & Guilds Limited, a company registered in England and Wales (company number 16513878).

City & Guilds
1 Giltspur Street
London EC1A 9DD
T +44 (0)844 543 0000
F +44 (0)20 7294 2413
www.cityandguilds.com