

## National Unit Specification: general information

**UNIT** Contact Centre Skills: Call Handling (Intermediate 1)

**CODE** DN8E 10

### COURSE

#### SUMMARY

This Unit is designed to provide the candidate with interpersonal and technology skills required in dealing with customers by telephone. It is intended for candidates who are undertaking a Scottish Progression Award in Contact Centre Skills. It may also be used as a stand-alone Unit which introduces the candidate to the skills underpinning dealing with telephone callers.

#### OUTCOMES

1. Handle inbound calls effectively.
2. Handle outbound calls effectively.
3. Record information conveyed by telephone.
4. Manage the escalation of calls.

#### RECOMMENDED ENTRY

Entry to this Unit is at the discretion of the centre.

#### CREDIT VALUE

1 credit at Intermediate 1 (6 SCQF credit points at SCQF level 4\*)

*\*SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.*

#### CORE SKILLS

There is no automatic certification of core skills or core skills components.

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### Administrative Information

**Superclass:** AF

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## **National Unit Specification: statement of standards**

### **UNIT      Contact Centre Skills: Call Handling (Intermediate 1)**

Acceptable performance in this Unit will be the satisfactory achievement of the standards set out in this part of the Unit Specification. All sections of the statement of standards are mandatory and cannot be altered without reference to the Scottish Qualifications Authority.

#### **OUTCOME 1**

Handle inbound calls effectively

##### **Performance Criteria**

- (a) Comply with organisational procedures.
- (b) Elicit and confirm essential information in accordance with the Data Protection Act.
- (c) Speak clearly and audibly.
- (d) Use systems and technology effectively.
- (e) Maintain a positive image of the organisation.

##### **Evidence Requirements**

Performance evidence that the candidate meets the standards defined by the performance criteria for a minimum of three calls. Evidence will be in the form of an observation checklist supported by data records.

#### **OUTCOME 2**

Handle outbound calls effectively

##### **Performance Criteria**

- (a) Comply with organisational procedures.
- (b) Elicit and confirm essential information in accordance with the Data Protection Act.
- (c) Convey essential information accurately and concisely.
- (d) Adapt tone, register and language to meet the needs of callers.
- (e) Maintain a positive image of the organisation.

##### **Evidence Requirements**

Performance evidence that the candidate meets the standards defined by the performance criteria for a minimum of three calls. Evidence will be in the form of an observation checklist supported by data records.

#### **Outcome 3**

Record information conveyed by telephone.

##### **Performance Criteria**

- (a) Comply with authorisation procedures.
- (b) Comply with relevant legislation.
- (c) Record accurate information on a database.
- (d) Maintain electronic files.

## **National Unit Specification: statement of standards**

### **UNIT        Contact Centre Skills: Call Handling (Intermediate 1)**

#### **Evidence Requirements**

Performance evidence that the candidate meets the standards defined by the performance criteria for a minimum of three calls. Evidence will be in the form of an electronic portfolio of data records.

#### **OUTCOME 4**

Manage the escalation of calls.

#### **Performance Criteria**

- (a) Recognise own limitations
- (b) Escalate customer issues according to organisational requirements.
- (c) Keep caller informed at all stages.
- (d) Use correct process to hold and retrieve call.
- (e) Use correct process to transfer and introduce call to recipient.
- (f) Close call appropriately.

#### **Evidence Requirements**

Performance evidence that the candidate meets the standards defined by the performance criteria for a minimum of one call. Evidence will be in the form of an observation checklist supported by data records.

## **National Unit Specification: support notes**

### **UNIT           Contact Centre Skills: Call Handling (Intermediate 1)**

This part of the Unit Specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

#### **GUIDANCE ON THE CONTENT AND CONTEXT FOR THIS UNIT**

The Unit is intended for candidates following a course of study and programmed activities in contact centre skills. It has been identified as one of six Units which will contribute towards a Scottish Progression Award in *Introductory Contact Centre Skills*.

The outcomes of this unit are designed to develop the candidate's ability to handle inbound and outbound calls within a variety of situations in a contact centre, to use systems and technology effectively and to recognise and manage the need for a call to be transferred or escalated to a third party.

At this level the emphasis should be on following organisational procedures and on the need to maintain client confidentiality, raising the candidate's awareness of the impact of relevant legislation including the Data Protection Act, rather than requiring specific and detailed knowledge of the law. An understanding of the Telephone Preference Service is necessary.

#### **GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT**

If this Unit is delivered as part of a group award, it is recommended that it should be taught and assessed within the subject area of the group award to which it contributes. If the Unit is being delivered as part of the Scottish Progression Award there are opportunities for integration with other units in the award framework.

#### **Outcome 1**

The emphasis of the Outcome is on listening, speaking and questioning skills, on the ability to convey a positive image of the organisation and to follow procedures. This will include identifying self and location/company promptly and clearly, and asking for details and clarifying the identity of a caller and purpose of call in line with the Data Protection Act before continuing. The candidate should repeat unclear or unusual names, places, postcodes and use phonetics if necessary. Clear speech and a patient, empathetic and polite manner would convey a positive image for the organisation.

The candidate could be involved in situations such as: confirming/ amending an appointment, taking orders or bookings, dealing with queries, giving quotes, taking a message, brochure requests, updating address details - where the data is captured on a database.

The candidate must be aware of security aspects and confidentiality of data, as detailed in the Data Protection Act.

Where simulation is necessary, the other person in the simulation must be carefully briefed to provide enough opportunity and stimulus to the candidate to develop the above range of skills.

## **National Unit Specification: support notes (cont)**

### **UNIT           Contact Centre Skills: Call Handling (Intermediate 1)**

#### **Outcome 2**

The emphasis of the Outcome is on conveying information or making an arrangement.

The candidate should be given the opportunity to practise conveying information by telephone in a variety of situations such as: making an arrangement for a rep to call, lead generation, lead follow-up. The candidate must be aware of security aspects and confidentiality of data, as detailed in the Data Protection Act. Contact must be made with the appropriate person without disclosing information to third parties.

The candidate should make judicious use of register, tone and vocabulary throughout and should be encouraged, where appropriate, to be confident, positive, courteous, friendly, persuasive, assertive but not aggressive. A positive image for the organisation should be conveyed consistently.

Language used should be free from jargon, technical language or colloquialism; speech should be clearly enunciated and modified to suit the needs of the receiver as appropriate.

#### **Outcome 3**

Data should be recorded electronically, and information should be accurate and correctly spelt. Simultaneous data capture is not essential, but to be encouraged. Emphasis should be placed on experiential learning. The candidate should be encouraged to maintain a portfolio of all activities carried out during the delivery of the Unit.

#### **Outcome 4**

The emphasis of this Outcome is on handling the calls -which might be one of those generated in Outcomes 1 and 2- appropriately, transferring where necessary.

The candidate should be given the opportunity to carry out a practical task by using the relevant telephony process in a variety of situations such as: transferring a call to another individual/department, placing call on hold to ascertain information, retrieving a call to conclude with caller.

A positive image and confident use of telephone systems should be displayed consistently.

Where simulation is necessary, the other person in the simulation must be carefully briefed to provide enough opportunity and stimulus to the candidate to develop the above range of skills.

### **GUIDANCE ON APPROACHES TO ASSESSMENT FOR THIS UNIT**

For all assessments:

- ◆ the assessment of performance should be as natural and efficient as possible and therefore some evidence of competence should come from assessors and/or others acting as ‘expert witnesses’. Detailed observation checklists, witness testimony and peer and self assessment may all provide appropriate performance evidence

## **National Unit Specification: support notes (cont)**

### **UNIT           Contact Centre Skills: Call Handling (Intermediate 1)**

- ◆ written evidence should arise naturally from tasks and activities appropriate to the workplace, such as copies of electronic files, work logs, e-mail, contact reports and job sheets.
- ◆ ephemeral evidence, for example of decision taking, could be cross checked by oral questioning and backed up by brief written evidence – for example in the form of annotations to observation checklists

There are opportunities for integration with assessment of other Units in the award.

The use of simulation in a realistic workplace environment is acceptable where performance evidence in the workplace is unobtainable.

### **CANDIDATES WITH ADDITIONAL SUPPORT NEEDS**

This Unit Specification is intended to ensure that there are no artificial barriers to learning or assessment. The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative Outcomes for Units. For information on these, please refer to the document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* (SQA, 2004).