

National Unit Specification: general information

UNIT Contact Centre Skills: Personal and Organisational Effectiveness
(Intermediate 1)

CODE DN8H 10

COURSE

SUMMARY

This Unit is designed to develop personal and organisational skills in the context of contact centre work. 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.

OUTCOMES

1. Contribute to planning contact centre workflow.
2. Contribute to organisation and maintenance of contact centre workflow.
3. Review performance of self and others.
4. Develop self to improve performance.

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.*

Administrative Information

Superclass: HB

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National Unit Specification: general information (cont)

CORE SKILLS

Achievement of this Unit gives automatic certification of the following:

Complete Core Skills	Problem Solving at SCQF level 4 Working with Others at SCQF level 4
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Core Skill component(s)	None
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National Unit Specification: statement of standards

UNIT Contact Centre Skills: Personal and Organisational Effectiveness (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

Contribute to planning contact centre workflow.

Performance Criteria

- a) Work with others to identify improvements to contact centre delivery.
- b) Define goals and targets.
- c) Identify strengths of self and others in the team.
- d) Agree appropriate technological procedures and channels of communication.
- e) Agree own role and responsibilities.

Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria. Evidence will be in the form of written records of group activity supported by an observation checklist.

OUTCOME 2

Contribute to organisation and maintenance of contact centre workflow.

Performance Criteria

- a) Organise and maintain own schedules efficiently.
- b) Manage time and resources effectively.
- c) Maintain electronic files.
- d) Work with others using technology to progress communication.
- e) Comply with organisational requirements.

Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria. Evidence will be in the form of electronic records supported by witness testimony.

OUTCOME 3

Review performance of self and others.

Performance Criteria

- a) Evaluate level of improvement to workflow achieved.
- b) Evaluate strengths and weaknesses of contribution by self and others.
- c) Present conclusions on potential improvements for self and organisation.

National Unit Specification: statement of standards (cont)

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Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria. Evidence will be in the form of written activity records supported by an observation checklist.

OUTCOME 4

Develop self to improve performance

Performance Criteria

- a) Seek feedback on own performance.
- b) Define personal goals and targets.
- c) Identify development activities.
- d) Draw up personal development plan for future progress.

Evidence Requirements

Performance evidence that the candidate meets the standards defined by the performance criteria. Evidence will be in the form of records of a personal review interview supported by a written personal development plan.

National Unit Specification: support notes

UNIT Contact Centre Skills: Personal and Organisational Effectiveness (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 has been identified as one of six Units which will contribute towards a Scottish Progression Award in *Introductory Contact Centre Skills*.

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.

The unit provides opportunities to develop awareness of the role of interpersonal communication in workplace team activities and encourages responsibility and reliability in group problem solving approaches to workplace tasks. The value of technology in communicating and recording suggestions and decisions, and as a tool in target setting and measuring progress, links the general team working skills with those specific to the Contact Centre workplace. Tasks could be undertaken in the context of, for example, improving business targets, delivering a specific contract or generally improving services to customers. At this level candidates will require some support to define goals and carry out activities. Assessors should work out an assessment plan and discuss it with candidates at an early stage of delivery. Candidates will require an understanding of the limits of their authority, and when and whom to ask for guidance or support. A limited range of options, including some independence in making decisions on methods and channels of communication, or on the use of such resources as the Internet would be anticipated.

Some simulation in a training context could be useful, in order to focus on organisational systems, procedures and on the requirements of such legislation as health and safety and data protection. Candidates could also be directed to appropriate websites to support online learning.

Outcome 1

A group meeting will be the most likely context for the activities in this Outcome. Establishing lines of communication and when to report to colleagues, refer or escalate is an important part of planning for workplace improvements. Understanding the range of resources available, including other people and appropriate database or internet site information is an aspect of agreeing a work role. As in the workplace the amount of negotiation in undertaking required tasks will be limited by such considerations as well as the systems and procedures required by an organisation. A proforma for the individual candidate written record of activity may be in electronic format and will provide candidates with a guide for activities in Outcomes 3 and 4.

National Unit Specification: support notes

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Outcome 2

Candidates will require evidence that they have been efficient in undertaking the tasks agreed, for example in working to time and meeting allocated targets. Peer and self assessment sheets to assist with evaluation of contributions may be useful. Evidence of seeking and giving support, and of balancing potential conflict between customer and organisational expectations could demonstrate contribution to group tasks. Methods used to provide evidence of communicating and recording effective working practice may include copies of screen pop, e-mail, text chat, collaborative browsing, pre-defined report production as well as general records.

Outcome 3

Some support will be needed in order for candidates to identify ways in which to measure effectiveness in meeting the original goals. A review meeting with the assessor taking a positive approach to examining the successes of attempts to improve the workflow could be useful. This should be supportive, with praise for candidates who have been reliable and demonstrated interpersonal skills within the group and with customers, even where targets have not been met. Discussion of what has been learnt and potential changes for future work will aid team building and assist with preparation for the individual personal interview in Outcome 4.

Outcome 4

Each candidate will need to know

- ◆ the principles of Personal Development Planning
- ◆ the extent to which their self evaluation is confirmed by the experiences gained and views of colleagues, peers, assessors
- ◆ realistic options in learning and in career progression in their selected vocation

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
- ◆ 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.

National Unit Specification: support notes (cont)

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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).