

H11S 04 (CFACC9) Use systems and technology during customer contact in a contact centre

Overview

What this standard is about

Contact centres use a variety of systems and technology to handle contacts with customers. Using that technology is one of the main skills for handling a full range of routine customer contacts. You need to use many features of the systems and technology. You also need to draw down information from the system to generate simple and defined reports. As an agent in a contact centre use of the technology is a key part of the job.

Performance Criteria

You must be able to:

Use features of systems and technology to handle customer contacts with a contact centre

- 1 Handle contacts identified by the contact distribution system.
- 2 Access customer information through the system in accordance with organisational procedures.
- 3 Use available contact handling systems to deal with customers efficiently and effectively.
- 4 Make adjustment to individual system settings for communication with customers through telephony, web technology, radio or other interactive functionality.
- 5 Use available technology appropriately by making choices between different functionality to enhance customer service.
- 6 Explain the benefits of different technology systems for customers in order to communicate clearly why you are taking various actions.

Report on customer and contact handling information using pre-defined formats

- 7 Identify customer and contact handling information that is needed for personal work planning or organisational reporting.
- 8 Agree organisational report needs with a team leader or other person with appropriate authority.
- 9 Make appropriate adjustments to pre-defined report formats to ensure that outputs are as required.
- 10 Use available software functionality to produce pre-defined customer information and contact handling reports.
- 11 Check report results for general sense before making full use of them.

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Knowledge and Understanding

You need to know and understand:

- (a) Organisational requirements and external regulation or legislation that impact on contact centre operations.
- (b) Organisational procedures and guidelines for customer contact handling.
- (c) Organisational procedures for customer identification and identity validation.
- (d) The purpose of contact distribution systems and how your own organisation's system works.
- (e) Features of your organisation's customer information systems that enable you to deal with customers effectively and efficiently.
- (f) System settings that enable you to access different interactive functionality.
- (g) How to make choices between different interactive functionality to optimise customer service.
- (h) The benefits of different technology for customers.
- (i) Ways to identify information that is needed in reports for personal planning or organisational feedback.
- (j) The importance of agreeing report content with an appropriate person.
- (k) The importance of checking report output for general overall sense before use.

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Evidence Requirements

To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria and Knowledge and Understanding.

- 1 All evidence must be based on your performance at work.
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time on different occasions for your assessor to be confident that you are competent.

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Candidate Recording Form

Candidate's name _____ Assessor's name _____

Unit title																								
Ref	Description of Evidence	Performance Criteria											Knowledge and Understanding											
		1	2	3	4	5	6	7	8	9	10	11	a	b	c	d	e	f	g	h	i	j	k	

Comments
Statement of competence
I confirm that all evidence (including Knowledge and Understanding), for the entire Unit has been met:
Candidate's signature _____ Date _____
Internal Verifier's signature _____ Date _____
Assessor's signature _____ Date _____ Date sampled (by IV) _____