BSBCCO602B Manage customer contact information

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Replaces BSBCCO602A Manage customer contact information

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage customer contact information and the management information systems (MIS) used in a customer contact environment.

Managers design specific implementation programs within these systems, including data collection, measurement types and patterns, and reporting strategies, as well as managing the use of information obtained.

Competence in this unit requires using MIS to produce accurate and relevant information and reporting that support the efficient running of the centre or business unit. It also requires knowledge of the requirements to design, implement and tailor information systems to meet the changing needs of the environment.

Application of the Unit

This unit applies to customer contact activity in a small, medium or large organisation. This work is undertaken by specialist staff or those with managerial responsibility, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Select and set activity and transaction records and measurements	1.1 Analyse **business plan** and budget to identify relevant business information needs
	1.2 Identify possible **contact pathways**
	1.3 Identify measurement methods and **MIS** used in each step in contact pathway
	1.4 Configure information systems to capture required measurements
	1.5 Develop and implement testing procedures for transaction and call/contact pathway measurements
2. Collect data	2.1 Identify data-collection methods in information technology systems used
	2.2 Monitor quantitative and qualitative data collection to ensure accuracy
	2.3 Ensure data collection is segmented or sorted as required and provides the correct levels of information
3. Analyse MIS resulting from customer contact activities	3.1 Identify call/contact traffic and transaction patterns, and other trends and activities
	3.2 Apply correct data analysis methodologies
	3.3 Accurately interpret data
4. Prepare and present information	4.1 Identify **stakeholders** for contact centre information
	4.2 Tailor contact centre information presentations for each stakeholder as appropriate
	4.3 Present both short- and long-term contact centre information system reports as required

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret, report and recommend actions from complex data and information
- communication skills to:
  - communicate effectively with personnel and clients at all levels
  - conduct effective formal and informal meetings
- interpersonal skills to:
  - establish rapport and build relationships with clients, team members and stakeholders
  - develop and participate in relevant networks
  - leadership skills to gain the trust and confidence of colleagues and clients
- numeracy skills to:
  - manage budgetary resources
  - read, validate and interpret data
- presentation skills to:
  - articulate information and ideas clearly
  - develop and present reports that deal with complex ideas and concepts
- problem-solving skills to create innovative solutions to problems or challenges
- research and data-collection skills to conduct comprehensive and accurate reporting
- self-management skills to:
  - comply with policies and procedures
  - pay attention to detail when making observations and recording outcomes
  - seek learning and development opportunities
- technology skills to:
  - organise and present data
  - use information technology.

Required knowledge

- budgetary requirements and principles
- business plans and objectives
- call and other contact traffic MIS
- meeting and minute taking principles
- methods of collecting reliable information and data and commonly encountered problems, and strategies for overcoming such problems
- organisational models and structures for managing customer contact information and the roles of key people
- principles of electronic information management and methods of reporting information
- reporting requirements and methodology.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: - develop, use, analyse and manage information systems to provide reliable and appropriate information and reporting to support the effective operation of a customer contact environment - demonstrate knowledge of call and other contact traffic MIS.
Context of and specific resources for assessment	Assessment must ensure access to: - information and databases for analysis activities - relevant guidelines and standards - stakeholder feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: - direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate - review of business plan analysis and reporting needs - review of records of call pathways and related information systems - review of reports from information systems demonstrating a cohesive report plan - analysis of call traffic reports with reference to varying levels of contact centre operations - demonstration of reports tailored for different audiences - oral and/or written questioning to assess knowledge of business models and models for contact centres - review of ability to relate business plans and models to the information needs of an enterprise.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: BSBCCO601B Optimise customer contact operations.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Business plan may include:	- action plans - business objectives - desired business outcomes - financial or budgetary targets - standards and guidelines - targets.
Contact pathways may include:	- automated call distribution (ACD) systems - contact management systems - email - facsimile - internal transfers and escalations - interactive voice response (IVR) - letter - telephone - web-based contacts.
MIS may include:	- range of computer systems used in receiving, routing and reporting on contact centre communications traffic, including: - data generating and data recording components of telephone, ACD and IVR systems - add-on systems that integrate with these systems.
Stakeholders may include:	- centre staff - management - other internal departments - own team - vendors and external contractors.

Unit Sector(s)

Stakeholder relations – contact centre operations