



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO606A Forecast and plan using customer contact traffic information analysis

Revision Number: 1

BSBCCO606A Forecast and plan using customer contact traffic information analysis

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively forecast and plan resourcing for customer contact operations. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.
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Application of the Unit

Application of the unit	This unit applies to the analysis of call/contact traffic information and the use of queuing theory to forecast and plan resourcing for customer contact operations. Competence in this unit requires accurately forecasting call/contact volumes, and assessing and planning appropriate resourcing levels to meet the requirements of the organisation. This work can be undertaken by specialist staff, operational management staff or those with managerial responsibility, depending on the size and structure of the centre.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Prerequisite units	

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

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.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Analyse call/contact traffic data	1.1. Confirm the accuracy and appropriateness of <i>call/contact traffic data</i> 1.2. Identify call/contact traffic patterns over short and long <i>intervals</i> 1.3. Identify anomalies and non-recurring events in call/contact patterns
2. Interpret the impact of customer contact phenomena on forecasting and planning	2.1. Define and identify the range of <i>contact centre or customer contact phenomena</i> affecting resource planning 2.2. Analyse and explain impact of phenomena 2.3. Identify issues arising from the impact of customer contact phenomena when forecasting and planning
3. Develop call/contact traffic forecasts	3.1. Provide a baseline for forecast by collecting historical data 3.2. Collaborate with marketing, financial control and other areas to incorporate budget expectations and marketing efforts into forecast 3.3. Breakdown annual forecast into smaller periods and adjust for seasonality 3.4. Ensure that forecast accuracy is within organisational requirements
4. Plan labour requirements	4.1. Determine basic inputs to <i>queuing tool/s</i> 4.2. Calculate resources required using queuing tool/s 4.3. Adjust results to account for <i>qualitative factors</i> 4.4. Perform planning process for all levels of forecasted call traffic

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- analytical skills to analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
- communication skills to conduct effective formal and informal meetings and to communicate with personnel at all levels
- consultation and negotiation skills to develop, implement and monitor plans
- financial skills to manage budgetary resources
- information technology skills to manage, organise and present data and information
- leadership skills to gain trust and confidence of colleagues and stakeholders
- numeracy skills to carry out arithmetical calculations and to analyse trends and patterns
- organisational skills to manage own tasks within timeframes
- presentation skills sufficient to develop reports and presentations which deal with complex ideas and concepts, and to articulate information and ideas clearly.

Required knowledge

- business planning and budgeting principles
- call/contact traffic measurement systems
- external factors and contact centre operational factors potentially impacting on planning and forecasting
- operating environment requirements and objectives
- organisational communication methods
- principles of statistical analysis and reporting
- queuing and forecasting tools.

Evidence Guide

EVIDENCE GUIDE	
<p>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.</p>	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • effective and accurate preparation of call/contact forecasts and calculation of resources required to support these forecasts • knowledge of call/contact traffic measurement systems.
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> • access to workplace information and data • access to information and databases for analysis activities • access to standards and guidelines.
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of forecasts against actuals • review of reports and explanation of historical call traffic data • review of reports and explanation of resource calculations • review of call traffic forecasts for a range of timeframes including consideration of contingencies and external factors • oral and/or written questioning to assess knowledge of the impact of customer contact phenomena on forecasting • review of stakeholder feedback.
Guidance information for assessment	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> • BSBCCO601A Optimise customer contact operations

EVIDENCE GUIDE

- BSBCCO608A Manage customer contact operational costs.

Range Statement

RANGE STATEMENT	
<p>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.</p>	
<p><i>Call/contact traffic data</i> may include:</p>	<ul style="list-style-type: none"> • data extracted from customer contact systems which can detail statistics of numbers, types and times of calls and which may be sorted and tabulated for individual agents and groups of agents • data on other types of contact - email, letters, website, text messages, face-to-face
<p><i>Intervals</i> may include periods for reporting which may be:</p>	<ul style="list-style-type: none"> • half hourly • hourly • daily • weekly • seasonal • annual
<p><i>Contact centre or customer contact phenomena</i> may include:</p>	<ul style="list-style-type: none"> • administration duties • billing and credit issues • climate, environmental and health factors • equipment failures • excessive call lengths • excessive leave commitments • external influences/factors • marketing and competitor activity • media attention • training periods and team meetings
<p><i>Queuing tools</i> may include:</p>	<ul style="list-style-type: none"> • Erlang B and C tools • facilities within Automated Call Distribution (ACD) systems which provide the capacity to sort and queue different types of calls in accordance with pre-set business rules
<p><i>Qualitative factors</i> may include:</p>	<ul style="list-style-type: none"> • call cost considerations • marketing activity • seasonal variations • variations in staff availability

Unit Sector(s)

Unit sector	
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Competency field

Competency field	Stakeholder Relations - Contact Centre Operations
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Co-requisite units

Co-requisite units		