



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO606B Forecast and plan using customer contact traffic information analysis

Release: 1

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Modification History

Release	Comments
Release 1	<p>This version first released with <i>BSB07 Business Training Package version 6.0</i>.</p> <p>Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.</p> <p>Replaces BSBCCO606A Forecast and plan using customer contact traffic information analysis.</p>

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to analyse call or contact traffic information to forecast and plan resourcing for customer contact operations. Competence in this unit requires the use of queuing theory to forecast call or contact volumes, and assessing and planning appropriate resourcing levels to meet the requirements of the organisation.

Application of the Unit

This unit can be undertaken by specialist staff, operational management 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
<i>Elements describe the essential outcomes of a unit of competency.</i>	<i>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.</i>

Elements and Performance Criteria

1. Analyse contact traffic data	1.1 Confirm the accuracy and appropriateness of <i>contact traffic data</i> 1.2 Identify call or contact traffic patterns over short and long <i>intervals</i> 1.3 Identify anomalies and non-recurring events in 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 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 Break down 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 tools</i> 4.2 Calculate resources required using queuing tools 4.3 Adjust results to account for <i>quantitative and qualitative factors</i> 4.4 Perform planning process and <i>scheduling</i> for all levels of forecasted call and contact traffic

Required Skills and Knowledge

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

Required skills

- analytical skills to:
 - analyse workplace information and data
 - consider all options and support the development of the strategy
 - use observations of workplace tasks and interactions between people and their activities, equipment, environment and systems
 - pay attention to detail when making observations and recording outcomes
- communication skills to:
 - communicate effectively with personnel at all levels
 - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- leadership skills to gain the trust and confidence of colleagues and stakeholders
- literacy skills to prepare and present reports on complex concepts and ideas
- numeracy skills to:
 - carry out arithmetical calculations
 - analyse trends and patterns
 - manage budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas effectively
- problem-solving skills to create innovative solutions to problems that arise
- project management skills to:
 - develop and implement the strategy successfully
 - achieve ongoing continuous improvement
- risk assessment and mitigation skills to fully understand and, if necessary, mitigate potential impacts of activities
- self-management skills to:
 - comply with policies and procedures
 - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

Required knowledge

- business planning and budgeting principles
- 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
- scheduling techniques.

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	<p>Evidence of the ability to:</p> <ul style="list-style-type: none"> • prepare contact forecasts and calculate resources required to support these forecasts • demonstrate knowledge of contact traffic measurement systems.
Context of and specific resources for assessment	<p>Assessment must ensure access to:</p> <ul style="list-style-type: none"> • information and databases for analysis activities • 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 and contact 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"> • BSBCCO601B Optimise customer contact operations • BSBCCO608B Manage customer contact operational costs.

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.

<p>Contact traffic data may include:</p>	<ul style="list-style-type: none"> • data extracted from customer contact systems that: <ul style="list-style-type: none"> • can detail statistics, such as numbers, types and times of calls • may be sorted and tabulated for individual agents and groups of agents • data on other types of contact: <ul style="list-style-type: none"> • email • face-to-face • letters • SMS (text messages) • website.
<p>Intervals may include periods for reporting, which may be:</p>	<ul style="list-style-type: none"> • annual • daily • half hourly • hourly • seasonal • weekly.
<p>Contact centre or customer contact phenomena 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 or factors • marketing and competitor activity • media attention • training periods and team meetings.
<p>Queuing tools 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 according to pre-set business rules.
<p>Quantitative and qualitative factors may</p>	<ul style="list-style-type: none"> • call cost considerations • marketing activity

include:	<ul style="list-style-type: none"> • seasonal variations • variations in staff availability.
<i>Scheduling</i> may include:	<ul style="list-style-type: none"> • business demands, goals and key performance indicators (KPIs) • forecasting enquiries by using a forecasting model that uses weighted averages from previous scheduling periods, including: <ul style="list-style-type: none"> • calls • email • escalations • mail • employee preferences • heuristic, where call sequence is ordered by customer balance • legislation and regulations • operational constraints • scheduling methods, such as: <ul style="list-style-type: none"> • batch optimised: hourly scheduling (16-hourly lists) • dynamic optimised: hourly scheduling (re-optimised at the beginning of every hour) • work function projections, incorporating quality and quantity.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.