



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO403A Schedule customer contact activity

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with <i>BSB07 Business Training Package version 6.0</i>

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to schedule customer contact activity. It requires the skills and knowledge to manage customer contact schedules using manual and electronic systems.

Application of the Unit

This unit applies to any customer contact environment.

This work can be undertaken by specialist staff, administration organisers, operational team leaders or those with supervisory responsibility, depending on the size and structure of the contact 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 Access <i>contact traffic data</i> 1.2 Identify contact traffic patterns over short and long <i>intervals</i> 1.3 Identify anomalies and non-recurring events in contact patterns
2. Review forecasting and planning	2.1 Incorporate the identified range of <i>contact centre or customer contact phenomena</i> into resource planning 2.2 Incorporate the issues arising from the impact of customer contact phenomena when forecasting and planning
3. Plan labour requirements	3.1 Determine basic inputs to <i>queuing tools</i> 3.2 Calculate resources required using queuing tools 3.3 Adjust results to account for <i>quantitative and qualitative factors</i> 3.4 <i>Schedule</i> levels of forecasted call and contact traffic 3.5 Maximise operational efficiency and customer service levels in schedules while minimising wage costs 3.6 Use the available skill base appropriate to schedule the most effective use of human resources 3.7 Communicate schedules to staff within designated timelines

Required Skills and Knowledge

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

Required skills

- communication skills to:
 - communicate with personnel at all levels
 - conduct effective formal and informal meetings
 - express ideas and concepts
- supervisory skills to gain trust and confidence of colleagues and stakeholders
- numeracy skills to:
 - carry out basic arithmetical calculations
 - apply financial understanding to adhere to budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
 - comply with policies and procedures
 - seek learning and development opportunities
- technology skills to organise data and information.

Required knowledge

- budgeting principles
- contact traffic measurement systems
- operating environment requirements and objectives
- organisational communication methods
- queuing and forecasting tools
- techniques for scheduling call and contact traffic.

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: • prepare customer contact schedules • demonstrate knowledge and use of key features of contact traffic measurement systems.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • standards and guidelines in relation to customer contact scheduling.
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 call and contact traffic schedules 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 on service.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO404A Gather, collate and record information • BSBCUS401B Coordinate implementation of customer service strategies.

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.

Contact traffic data may include:	- data extracted from customer contact systems that can: - detail statistics of numbers, types and times of contact - be sorted and tabulated for individual agents and groups of agents - data on other types of contact, including: - email - face-to-face - letters - SMS (text messages) - website.
Intervals may include:	- periods for reporting, which may be: - annual - daily - half hourly - hourly - seasonal - weekly.
Contact centre or customer contact phenomena may include:	- administration duties - billing and credit issues - climate, environmental and health factors - equipment failures - escalating contacts - excessive call lengths - excessive leave commitments - external influences or factors - marketing and competitor activity - media attention - training periods and team meetings.
Queuing tools may include:	- Erlang B and C tools - facilities within automated call distribution (ACD) systems that provide the capacity to sort and queue different types of calls according to pre-set business rules.
Quantitative and	contact cost considerations

qualitative factors may include:	• marketing activity • seasonal variations • variations in staff availability • variations in staff experience and skills and knowledge.
Scheduling may include:	• business demands, goals and key performance indicators (KPIs) • forecasting enquiries, by using a forecasting model that uses weighted averages from previous scheduling periods, including: • calls • email • escalations • mail • employee preferences • heuristic, where call sequence is ordered by customer balance • legislation and regulations • operational constraints • scheduling methods, such as: • 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.