Telecommunications Training Package ICT97

Technical & Call Centre Streams

Volume 1: Part E – Call Centre Stream
Endorsed Competency Standards

Associated Volume Parts not in this publication & available separately

Volume 1 - General Information, Assessment Guidelines and Qualifications

Volume 1: Part A – Cabling Stream

Volume 1: Part B – CPE Stream

Volume 1: Part C – CAN Stream

Volume 1: Part D – Network Stream

Managing Agent

The Training Package has been prepared on behalf of the Information Technology and Telecommunications Industry Training Advisory Body (previously InfoComP Training) located at 139 Queensberry Street, Carlton South, Victoria, 3053

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Validity of Information

The content of this report has been validated at all stages of its development by Telecommunications Industry representatives. This validation ensures the accuracy of the information contained in this resource at the time of publication. Users are encouraged to check information with manufacturers and regulatory bodies when using this resource in the future.

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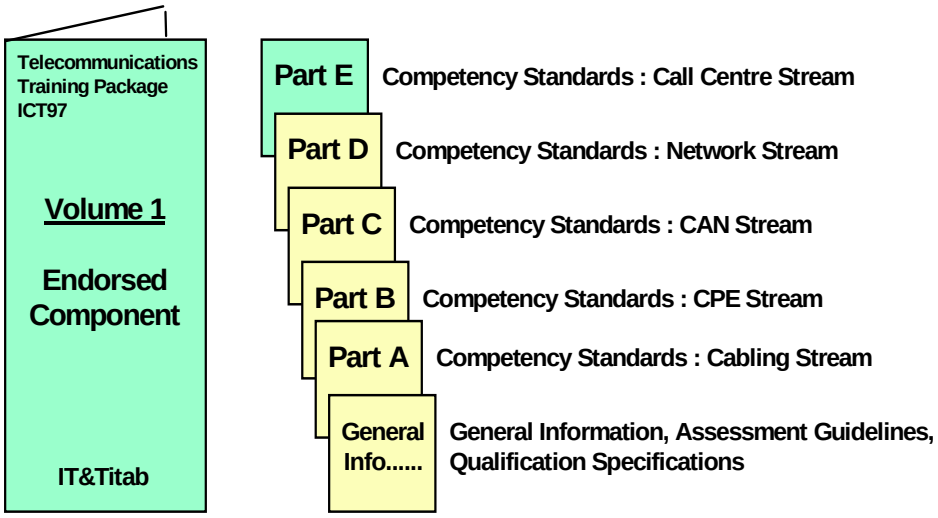
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Telecommunications Training Package

Endorsed Component

Part E

Competency Standards: Call Centres Stream



Part E of the Endorsed Telecommunications Training Package contains the complete set of the Technical Call Centres Stream Competency Standards and details of their application, assessment and recognition within qualifications are defined within the General Information (front section) of volume 1. The General Information, Assessment Guidelines and Qualifications Specifications section of volume 1 may be purchased separately.

INDEX – Call Centre Competency Standards

ICTTC200A - Use telecommunications technology in receiving/making calls in the call centre environment 5
ICTTC201A - Use basic computer technology to process enterprise and customer data 9
ICTTC202A - Use specific enterprise systems to satisfy customer requirements 13
ICTTC203A - Navigate and interrogate specific enterprise systems to satisfy customer requirements 17
ICTTC204A - Provide quality customer service 21
ICTTC205A - Manage and build on relationships with customers 26
ICTTC206A - Respond to inbound calls relating to a specific marketing campaign 30
ICTTC207A - Conduct outbound telemarketing campaign 34
ICTTC208A - Conducting telemarketing campaign involving selling of product/service 38
ICTTC209A - Conduct data collection for market research, opinion polls, customer surveying 43
ICTTC210A - Process sales of limited product/service from incoming inquiries 47
ICTTC211A - Process sales of complex product/service where customer is unsure of available solutions 52
ICTTC212A - Process sales which commit both customer/enterprise to considerable financial commitment 57
ICTTC213A - Provide support and assistance to customers relating to a particular product/service 62
ICTTC214A - Process general inquiries from customers and provide associated support and assistance 66
ICTTC215A - Provide support to staff and customers on inquiries/matters defending enterprise policy 70
ICTTC216A - Action reports of faults reported by customers relating to specific product/service 75
ICTTC217A - Action reports of product/service faults reported by customers 79
ICTTC218A - Negotiate with customers on major product/service faults 83
ICTTC219A - Resolve complaints dealing with specific product/service 88
ICTTC220A - Resolve customer complaints 92
ICTTC221A - Resolve the more complex customer complaints 97
ICTTC222A - Process low risk credit applications 102
ICTTC223A - Process high risk credit applications 107
ICTTC224A - Provide basic assistance to customers in relation to account inquiries 112
ICTTC225A - Process complex billing/account inquiries from customers 116
ICTTC226A - Handle to finality complex accounts, service severance and/or product return for default 121
ICTTC227A - Manage personal work priorities and professional development 126
ICTTC228A - Provide leadership to call centre staff in achievement of business goals and objectives 130
ICTTC229A - Establish and manage effective relationships within the call centre team environment 134
ICTTC230A - Lead, participate in and facilitate the activities of a call centre work team 138
ICTTC231A - Manage the operations of a call centre work team to achieved planned outcomes 142
ICTTC232A - Manage information and information systems in the call centre team environment 147
ICTTC233A - Lead a Call Centre team delivering quality customer service 151
ICTTC234A - Develop and maintain a safe workplace and environment 155
ICTTC235A - Implement and monitor quality and continuous improvement systems and processes 159
ICTTC236A - Facilitate and capitalise on change and innovation 163
ICTTC237A - Contribute to the development of a learning culture in the call centre team environment 167

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STREAM Call Centres

FIELD Telecommunications Technology

UNIT **ICTTC200A - Use telecommunications technology in receiving/making calls in the call centre environment**

Call centre activity is mainly built around the use of telecommunications technology in dealings with customers. This unit establishes competency in the effective and efficient operation and use of such technology.

Prerequisite Units
Nil

Equivalent Units
Recognition for this unit can be given on demonstration of competency against units BSACOM101A **and** BSACOM201A of the Administration Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Operate and effectively use telecommunications technology in the operational environment	1 Type of technology used is identified.
	2 Operational manuals are obtained and applied.
	3 Features of technology are identified and related to different usages.
	4 Equipment is correctly operated to generate and receive communication messages.
	5 Appropriate facilities and/or actions are used to receive, make, hold or transfer calls.
2 Receive and respond to incoming calls	1 Enterprise protocol is identified and used appropriately.
	2 Appropriate facilities and/or actions are used.
	3 Callers are identified correctly.
	4 The purpose of the incoming call is correctly identified and verified with the caller prior to subsequent action.
	5 Information disclosed in actioning the call is in keeping with enterprise policy.
	6 Calls which require attention from another person are transferred promptly and successfully.
	7 Messages are taken where appropriate in accordance with enterprise procedures.
	8 Messages are recorded using clear and concise language so that meaning is readily understood by the recipient.

3 Make outgoing calls and transmit messages	1 A clear objective for an outgoing call is established. 2 Prior to making a call, all relevant information is identified, located and obtained. 3 Required telephone number/s are obtained. 4 Contact is established using designated business protocol and procedures. 5 Purpose of the call is conveyed clearly and concisely to the recipient. 6 Purpose of the call is verified with the recipient to ensure clear understanding. 7 Messages are passed on clearly and concisely where required. 8 Understanding of a passed message is verified with the receiver.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.
Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers

- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Call Centre technology can be specific to the company and/or call centre. It is usually designed to meet the application needs of the particular centre.

Operational manuals are equipment specific and may be added to by enterprise instructions and procedures.

Call Centre traffic may be via voice (telephone) or by data (Fax, computer modem). Computer Telephony Integration (CTI) integrates computers and telephones.

Incoming callers may first be greeted by interactive voice recording and/or hold messages.

Incoming telephone traffic may be routed by automatic call distributors (ACD).

Callers may be customers, suppliers, enterprise staff.

Telephone systems may be single line phones (usually extension of PABX), business systems or unique PABX extension instruments. All such systems are unique to the supplier and all have different features, modes of operation. These are usually fully documented in relevant instruction manuals.

Telephone features may include hands free, hold facilities, transfer facilities and ACD specific facilities.

Proficiency in the use of communication technology includes accuracy and timeliness.

Protocol for receiving and making telephone calls specifies the phrasing used to identify both the call and the caller and usually takes the form of a standard phrase. The content of the phrase or phrases is unique to the enterprise/call centre.

Telephone numbers may be obtained from enterprise databases, telephone books, enterprise telephone directories, business directories.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements
- Freedom of Information

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Makes and receives calls in accordance with enterprise guidelines and timelines.
- Greets and screens customers effectively using specified procedures.
- Makes effective use of available telecommunications technology and ergonomic practices to make and receive calls.
- Correct commands, facilities and actions are used in processing telecommunications traffic.
- Make outbound calls using appropriate protocols.
- Verifies the outgoing message in a manner which ensures accuracy of understanding from the receiver.
- Receives, records and transmits messages in a clear, concise and timely manner.
- Accurately identifies source of calling data.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Skills and Knowledge
Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*
SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
SC007 Telephone, Computer and Fax Operational Skills
SC008 Telephone Manners
SC009 Computer Keyboard Usage
SC014 Voice Technique
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC054 Enterprise Calling Protocol
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
KC110 Stress Management Awareness
KC111 Workplace Ergonomics
KC112 Overview of Call Centre Operations

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**2**

STREAM Call Centres

FIELD Information Systems

UNIT **ICTTC201A - Use basic computer technology to process enterprise and customer data**

Enterprises have systems unique to their environment. This unit establishes basic competency in the use of computers generally.

Prerequisite Units
Nil

Equivalent Units
Recognition for this unit can be given on demonstration of competency against units BSATEC102A, BSATEC202A and BSATEC 203A of the Administration Training Package or unit FNARFS04A of Finance Industry Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Establish context and background information	1 Type of computer technology is identified. 2 Operational manuals are obtained. 3 Correct "Log On" procedures are identified and initiated. 4 Appropriate password is established and used in accordance with established protocol where required.
2 Identify and access relevant computer files	1 System applications are identified by their icons. 2 The keyboard and mouse are used proficiently to access applications. 3 System applications are accessed using correct keystrokes or mouse actions. 4 Appropriate tools and/or commands are used in operating the system. 5 System is exited using appropriate 'Log Off' procedures.
3 Retrieve, view and close system files	1 Uses of the various system applications are identified 2 Required application is selected and accessed 3 Relevant file is located and opened 4 Appropriate data location is identified and input or varied as required 5 File is accessed in a manner that preserves the integrity of the data 6 File and application is closed using defined procedures 7 Work is undertaken in a manner which is safe to both self and work colleagues.

4 Navigate help files	1 Help files are accessed and exited using correct keystrokes or mouse actions. 2 Appropriate commands, keystrokes or mouse actions are used to navigate help files to obtain the relevant information.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Computer technology can be specific to the enterprise and products.

Operational platforms are proprietary and normally enterprises build specific operational systems unique to their line of business to operate on such platforms.

Operational manuals are equipment specific and may be added to by enterprise instructions and procedures.

Call Centre traffic may be via voice (telephone) or by data (Fax, computer modem). Computer Telephony Integration (CTI) integrates computers and telephones.

Log on and log off procedures may vary dependent on the operational platform and specific applications.

Passwords may be personal, enterprise and/or system specific.

Keyboard and mouse actions may vary from system to system.

Tools and commands vary from system to system and may include edit, format, grammar and spelling check, tables, font and font size, page layout, data and print.

Data location may be in files, text, columns, cells, pictures, and may involve formulae.

Proficiency in the use of communication technology includes accuracy and timeliness.

Help files are unique to system platform.

Relevant legislation, codes, regulations and standards include:
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulate call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Logs on and log off effectively using the specified procedures.
- Understands and uses operational manuals.
- Correct keystrokes or mouse actions are used to navigate around systems and between applications.
- Identifies and uses the various applications.
- Uses the appropriate tools and commands in working through applications.
- Enters and/or varies data accurately and in a timely manner.
- Help files are accessed when required.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC009 Computer Keyboard Usage
SC010 Computer Literacy
SC011 Computer System Applications, Tools and Commands
SC012 Word, Graphics, Data Base, Spread Sheet Applications
KC027 Problem Solving Processes
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC066 Operational Environment: Customer Base, Company Products and Services
KC110 Stress Management Awareness
KC111 Workplace Ergonomics
KC112 Overview of Call Centre Operations

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**2**

STREAM Call Centres

FIELD Information Systems

UNIT **ICTTC202A - Use specific enterprise systems to satisfy customer requirements**

This unit establishes competency relating to the application and use of the various enterprise business systems developed to maintain up to date customer information.

Prerequisite Units
Nil

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Locate and interpret information on most commonly used system screens	1 Enterprise business systems are accessed using correct keying strategies. 2 Customer requests are analysed to determine what data needs to be accessed. 3 Possible sources of information are identified 4 Screens appropriate to the business to be transacted are located in a timely manner. 5 Standard system procedures are applied to satisfy customer requirements. 6 Appropriate codes are used to locate information. 7 Information from other sources is accessed as necessary. 8 Information, accessed from business systems and other sources, is analysed to meet customer requirements.
2 Update and maintain information related to customer transaction on commonly used system screens	1 Appropriate screen is accessed to initiate a transaction. 2 All relevant data required to complete a transaction, is entered. 3 Appropriate codes are used to complete a transaction. 4 Information and commands are input correctly 5 Transactions are checked for accuracy/errors before release
3 Seek support for system problems/issues identified during transaction	1 Appropriate sources of help, for problems/issues, are identified. 2 The identified source/s of help are accessed to resolve problems/issues.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

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- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
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- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **customer** is a user, purchaser, or beneficiary of a service, product, or process and may be internal or external to the organisation and may include colleagues.

Information may include both specific details requested by a customer or others, and details required from core business systems or other sources in order to complete a transaction or process.

A **transaction** is a sequence of interactions in enterprise business systems performed by the staff member in satisfying the customer's needs.

Other sources of information include previous experience, reference materials, colleagues

Enter or modify data includes entering information for storage, transactions to modify existing records and defined order types for the provision of products and services.
Core business systems help **sources** include system helpdesks, system operation units, reference materials, colleagues, supervisor, coaches.

Business Systems are unique to the enterprise and may even vary within business units within an enterprise

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- Telecommunications Act
- Occupational Health and Safety legislation
- Industrial Awards and agreements
- Freedom of information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Location
A call centre or simulated call centre environment.

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met.

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Application of enterprise systems relevant to satisfactory delivery of customer service.
- Use of various screens within business systems.
- Efficient and effective navigation of appropriate screens to access required information.
- Use of standard operating procedures as described in enterprise system manuals.
- Accurate use of codes used to locate data.
- Accurate entering of data onto the system.
- Checks to ensure data is captured in accordance with laid down procedures.
- Help files are accessed when required.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Oral and Written Communication 2
SC009 Computer Keyboard Usage
SC010 Computer Literacy
KC027 Problem Solving Processes
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Business Goals and Standards
KC063 Enterprise Business System(s) and Operating Platforms
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
KC110 Stress Management Awareness
KC111 Workplace Ergonomics
KC112 Overview of Call Centre Operations

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**2**

STREAM Call Centres

FIELD Information Systems

UNIT **ICTTC203A - Navigate and interrogate specific enterprise systems to satisfy customer requirements**

This unit establishes competency relating to the application and use of the various enterprise business systems developed to maintain up to date customer information

Prerequisite Units
Assumes ICTTC202A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Access a range of enterprise business systems	1 Core business systems are accessed using correct keying strategies. 2 Screens are navigated to locate displays and information. 3 Interfaces between core business systems are navigated.
2 Determine and locate information to satisfy customer requirements using multiple screens and more than one enterprise system	1 Customer inquiries are analysed to determine what data needs to be accessed. 2 Screens and systems necessary for the provision of information are identified. 3 Systems are accessed and interrogated to provide information necessary to complete customer transaction/inquiry. 4 Direct pathways are used to locate appropriate screens while discussions with customers continue. 5 Information from other sources is accessed as necessary. 6 Customer history is determined through navigation of relevant system screens. 7 Information, accessed from business systems and other sources, is analysed to meet customer requirements.
3 Enter or modify data to provide complex or advanced customer needs	1 Appropriate screen(s) or system(s) are accessed to initiate a transaction. 2 All relevant data required to complete a transaction, is entered. 3 Appropriate codes are used to complete a transaction. 4 Transactions are checked for accuracy/errors before release.

4 Identify and rectify system information and processing errors	1 Errors are identified and interpreted.
	2 Impact of errors on other system data or on other systems is analysed.
	3 Impacts of errors on both customers and the enterprise are determined.
	4 Decision as to action necessary to rectify problem is taken after consultation with colleagues/management as dictated by enterprise policy.
	5 Errors are rectified and accuracy of amendment is verified before completing transaction.
	6 Customers are informed of error and action taken where necessary.
	7 System problems are identified and brought to attention in accordance with enterprise policy.
	8 Cause and effect studies are undertaken and report prepared including recommendations for procedural change as necessary.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

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- Travel industry–reservations, information, customer support, loyalty programs.
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- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering: quality management, corporate conduct/ethics, people, health and safety, equal employment opportunity, escalated service difficulties, customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in business rules, accountabilities, stress management guidelines, ergonomic guidelines, authorising delegations, service memoranda of understanding/service delivery agreements, performance measures and targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including stakeholders, business context, technology and level of complexity of customers and products

A **customer** is a user, purchaser, or beneficiary of a service, product, or process and may be internal or external to the organisation and may include colleagues.

Information may include both specific details requested by a customer or others, and details required from business systems or other sources in order to complete a transaction or process.

A **transaction** is a sequence of interactions in core business systems performed by the staff member in satisfying the customer's needs.

Other sources of information include previous experience, reference materials, colleagues.

Enter or modify data includes entering information for storage, transactions to modify existing records and defined order types for the provision of products and services.
System **Interfaces** are the initial access screens for the business system.

Business Systems are unique to the enterprise and may even vary within business units within an enterprise.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- Telecommunications Act
- Occupational Health and Safety legislation
- Industrial Awards and agreements
- Freedom of information

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
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- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Application of business systems relevant to satisfactory delivery of customer service.
- Use of interfaces between business systems where required.
- Efficient and effective navigation of the systems to access required information.
- Use of standard operating procedures as described in enterprise system manuals.
- Accurate use of codes used to locate data.
- Accurate entering of data onto the system.
- Checks to ensure data is captured in accordance with laid down procedures.
- Identification and rectification of system errors.
- Analysis of errors and full and complete reporting of action to be taken including recommendations for procedural change where necessary.
- Satisfactory dealings with customers in explaining the errors and the action taken to rectify.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Basic Oral and Written Communication Skills
SC009 Computer Keyboard Usage
SC010 Computer Literacy
SC018 Negotiation Skills
KC027 Problem Solving Processes
SC043 Analytical Thinking
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Business Goals and Standards
KC063 Enterprise Business System(s) and Operating Platforms
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
KC110 Stress Management Awareness
KC111 Workplace Ergonomics
KC112 Overview of Call Centre Operations

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Information Systems

UNIT **ICTTC204A - Provide quality customer service**

Each individual operator has a responsibility to establish rapport with individual customers in the provision of quality information and service.

Prerequisite Units
Nil

Equivalent Units
Recognition for this unit can be given on demonstration of competency against unit FNARFS14A of the Finance Training Package **or** unit WRRCS1A of the Retail Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Receive an inquiry from the customer	1 Standard phrases are used to acknowledge the customer where applicable and in accordance with enterprise policy. 2 An attentive and helpful manner is used in dealings with customers.
2 Make initial contact with the customer	1 Introductions are made using standard phrases where applicable. 2 Customer's availability to continue with contact is assessed.
3 Establish a relationship with the customer	1 Customer identity and details are established and confirmed with customer records if appropriate. 2 Active listening, responding and empathy are applied to establish and maintain rapport with the customer.
4 Determine customer requirements	1 Active listening, questioning, responding and empathy are applied to determine the customer's requirements. 2 The customer's needs are ascertained to gain their agreement to a particular course of action. 3 Appropriate referral or hand-off procedures are implemented as required. 4 Progress made on customer request/inquiry is communicated fully to staff member delegated to progress the issue.

5 Respond to customer requests in a timely and effective manner	1 Inquiries and requests are responded to promptly and accurately in accordance with enterprise policy.
	2 The customer request is discussed in an articulate, easy to understand manner without the use of jargon or acronyms.
	3 Appropriate options are identified and recommended, within enterprise constraints, to satisfy the customer's need.
	4 Opportunities to promote company products and services are taken to meet the customer's request/needs as appropriate.
	5 A commitment, most appropriate to meeting the customer's needs, is discussed and agreed with the customer.
	6 Sources of additional or more detailed information are accessed as appropriate to meet the customer's request/needs.
	7 Service and products are provided to the customer as agreed and within business unit constraints.
	8 The customer is kept informed of progress
	9 The customer is provided with clear explanations regarding any delay or inability to meet commitments and satisfy their request/needs.
	10 Customer satisfaction is checked by summarising information and confirming that objectives have been m.
	11 Further assistance, with a commitment to service, is offered to the customer before closing.
	12 The standard phrase is used to close the call if applicable.
	13 Work is undertaken in manner which is safe to self and to fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **customer** is a user, purchaser or beneficiary of a service, product or process and may be internal or external to the enterprise and may include colleagues.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Active listening involves giving your full attention to the person who is speaking and responding in a way that lets them know you have listened and understood their message as they have intended.

Empathy is the ability to recognise people's feelings, and to respect the other person's position.

An **inquiry** is any question or request for information from a customer that can be resolved by provision of information.

Inquiries may involve:

- requests for advice or assistance from internal or external customers, workplace colleagues and group/team leaders, managers, other staff members and members of the general public
- questions about products and services
- interactions with customers in a billing, provisioning, faults, selling, telemarketing, general inquiry or complaints context.

Team refers to the whole centre, or any group/sub-unit within the centre.

A **commitment** is a promised course of action designed to meet the customer's needs. It includes building rapport, keeping promises, keeping the customer informed, doing it right the first time, owning the customer's request, responding to the customer's request with operational efficiency.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety legislation
- Industrial Awards and agreements
- Freedom of information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Understanding of enterprise mission, goals and plans.
- Knowledge of enterprise products, standards, policies and practices.
- Use of appropriate phrases in dealing with customers.
- Clear and concise communication with the customer including a full understanding of customer requirements.
- Satisfaction of customer inquiry/requirement.
- Referral of inquiry in a prompt and efficient manner when immediate satisfaction of customer need cannot be fully satisfied.
- Referral is completed in such a manner that the customer is satisfied that attempts to provide service are fully met.
- Various options are provided to the customer when more than one option can satisfy customer need.
- Commitments are made with customer in accordance with enterprise policy.
- Opportunities are taken to promote company products.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
SC009 Computer Keyboard Usage
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Business Goals and Standards
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC084 Relative Information Sources
KC110 Stress Management Awareness
KC111 Workplace Ergonomics
KC112 Overview of Call Centre Operations

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Customer Service

UNIT **ICTTC205A - Manage and build on relationships with customers**

This unit applies to the contribution that individual operators can make to the management of established relationships with the customer

Prerequisite Units
Assumes ICTTC204A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Contribute to identification and dimensioning of customer needs	1 Customer needs are clearly identified and dimensioned.
	2 Enterprise policy in relation to customers and service provided is identified and applied in meeting customer needs.
	3 Enterprise priorities are applied in customer dealings.
	4 Problems encountered in meeting customer needs are discussed fully with team leader and with other team members.
	5 Referral procedures are applied consistent with enterprise policy where customer needs cannot be fully satisfied.
	6 Inconsistencies between enterprise policy and customer needs are identified and brought to attention with recommendations as to possible change.
	7 Work is undertaken in manner which is safe to self and to fellow workers.
2 Obtain feedback from customers	1 Feedback from customers is both sought and encouraged
	2 Data relating to customer feedback is gathered and collated in accordance with enterprise policy
	3 Customer feedback is recorded and shared with members of own and other teams
3 Contribute to assessment and enhancement of customer satisfaction and relationships	1 Customer satisfaction data is measured against previous results.
	2 Customer feedback data is analysed against enterprise performance data.
	3 Customer feedback is used to improve quality of service and customer relationship.
	4 Recommendations relating to improvement of customer satisfaction results are provided where appropriate.
	5 Implement measures aimed at improving customer service and provide feedback on outcomes.

RANGE OF VARIABLES

Range of Variables
A call centre is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.
Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **customer** is a user, purchaser or beneficiary of a service, product or process and may be internal or external to the enterprise and may include colleagues.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Feedback may relate to both satisfactory and unsatisfactory outcomes in provision of customer service.

Customer satisfaction surveys may be conducted by call centre operators on an organised basis or as part of their everyday role. More formal surveys may be undertaken by the enterprise using both internal staff or specialised research groups.

Referral procedures for dealing with customer demands are unique to the enterprise and usually revolve around a hierarchy of help procedures ranging from management to specified help desks.

Customer Problems relate to difficulties with product, product performance, product faults, service difficulties, service satisfaction.

Team refers to the whole centre, or any group/sub-unit within the centre.

A **commitment** is a promised course of action designed to meet the customer's needs. It includes building rapport, keeping promises, keeping the customer informed, doing it right the first time, owning the customer's request, responding to the customer's request with operational efficiency.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety legislation
- Industrial Awards and agreements
- Freedom of information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications computer equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Understanding of enterprise mission, goals and plans.
- Knowledge of enterprise products, standards, policies and practices.
- Identification, dimensioning and satisfaction of customer needs.
- Application of enterprise policies in satisfying customer needs.
- Clear and concise communication of needs expressed by customers.
- Measurement of customer needs and satisfaction.
- Obtaining feedback from customers.
- Recognition and understanding of customer problems and resolution or timely referral of problem in a manner satisfactory to the customer.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication
SC005 Customer Service
KC013 Calling Principles
SC014 Voice Technique
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC018 Negotiation Skills
SC019 Consultative Skills
SC028 Problem Solving Skills
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Telemarketing

UNIT **ICTTC206A - Respond to inbound calls relating to a specific marketing campaign**

This unit applies to call centre operational staff who take inquiries in relation to a specific marketing campaign conducted by a company. It may involve an inquiry or a sale of the particular product or service being offered.

Prerequisite Units
Nil

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify campaign details	1 Details of campaign are obtained and studied. 2 Matters not understood are discussed and clarified with campaign manager. 3 Prepared call guides are studied where appropriate.
2 Process customer inquiries	1 Customer needs are clearly established. 2 Customer inquiries are satisfied in a prompt and efficient manner. 3 Inquiries beyond capability or beyond scope of campaign are referred to designated enterprise person or details are recorded for later response. 4 Information not supplied to the customer on the initial inquiry is followed up and relayed to the customer within the quickest possible time.
3 Arrange provision of campaign product/service	1 Details related to customer requirements are ascertained. 2 Full customer particulars are taken as required. 3 Appropriate enterprise records are completed and forwarded to area responsible for delivery of service and/or product. 4 Payment options are discussed and agreed with the customer. 5 Customers are advised as to payment methodology and address for payment. 6 Credit checks are arranged where enterprise policy requires. 7 Delivery arrangements are discussed and agreed with customer and included with customer particulars. 8 Privacy arrangements are fully applied during the transaction 9 Work is undertaken in manner which is safe to self and to fellow workers.

4 Record campaign results	1 Recorded outcomes are collated and presented in accordance with enterprise policy. 2 Difficulties encountered are recorded and reported as required.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Marketing campaigns may be related to provision of a particular service, or the marketing of a specific product.

A call guide is pre prepared either by the enterprise or external organisations consulting to the enterprise.

Records are specific to the enterprise and may take the form of paper, prepared form, electronic–computer.

Payment arrangements may be credit card, cheque, money order, cash, payment on delivery, direct debit.

Credit Card details may be card type, card holder details, card number, expiry date.

Credit checks may be automated or undertaken by sales person or by specialist staff within the enterprise.

Delivery/installation arrangements may include delivery address, time of delivery, arrangements for when householder not in attendance, payment on delivery details.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Privacy details cover name and address of purchaser, credit card details and item purchased.

Privacy is covered by the privacy act and relevant enterprise policy.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety legislation
- Freedom of information

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications computer equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Satisfactory processing of a customer inquiry relating to the specific marketing campaign.
- Matching of product/service to customer requirements.
- Agreement with customer as to payment and delivery arrangements.
- Accurate recording of sales, payment and delivery arrangements.
- Accurate application of pre prepared call guide.
- Accurate recording of campaign outcomes.
- Successful handling of difficulties incurred during campaign.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
KC013 Calling Principles
SC014 Voice Technique
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Telemarketing

UNIT **ICTTC207A - Conduct outbound telemarketing campaign**

This unit applies to call centre operational staff who take inquiries in relation to a specific marketing campaign conducted by a company. It may involve an inquiry or a sale of the particular product or service being offered.

Prerequisite Units
Nil

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify telemarketing campaign requirements	1 Campaign details are studied and questioned where details unclear. 2 Prepared call guide is studied and fully understood. 3 Operational boundaries are discussed and agreed. 4 Technology to be utilised is identified and most effective use determined. 5 Fulfilment processes are discussed, understood and agreed. 6 Call targets are identified and agreed.
2 Conduct campaign	1 Telephone calls are identified from data base. 2 Calls are made in the most efficient manner possible. 3 Call guide is followed in accordance with enterprise policies and procedures. 4 Call principles are followed in line with enterprise policy. 5 Customer responses are recorded accurately on the provided forms. 6 Customer queries are answered or referred to appropriate person in accordance with enterprise policy. 7 Customer requests are actioned in accordance with enterprise policy. 8 Work is undertaken in manner which is safe to self and to fellow workers.
3 Record campaign results	1 Recorded outcomes are collated and presented in accordance with enterprise policy. 2 Difficulties encountered are recorded and reported as required. 3 Performance against agreed call targets is assessed and analysed for future improvement. 4 Data base is amended where applicable.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Telemarketing campaigns may be related to fundraising, product sales and service, basic research.

Data base may be enterprise records, telephone directories, business directory, sales records.

Call guide is pre prepared either by the enterprise or external organisations consulting to the enterprise.

Operational boundaries relate to the bounds within which the telemarketer can operate – freedom to deviate from the call guide, limits of interchange with the customer.

Technology could be telecommunications based (e.g. telephone, business system, PABX), or interactive medium and information based (e.g. computer).

Records are specific to the enterprise and may take the form of paper, prepared form, electronic–computer.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety legislation
- Freedom of information
- Environment
- Consumer Protection
- Credit

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications computer equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Meeting of agreed call targets.
- Accurate application of pre prepared call guide.
- Accurate recording of campaign outcomes.
- Successful handling of difficulties incurred during campaign.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
KC013 Calling Principles
SC014 Voice Technique
SC015 Empathy
SC016 Listening Skills
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Telemarketing

UNIT **ICTTC208A - Conducting telemarketing campaign involving selling of product/service**

This unit applies to telemarketing involving the sale of usually small items using a set call guide from a database of contacts and may involve both inbound and outbound calling.

Prerequisite Units
Assumes ICTTC206A and/or ICTTC207A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify telemarketing campaign requirements	1 Campaign details are studied and questioned where details are unclear. 2 Prepared call guide is studied and fully understood. 3 Product/service to be sold is identified and all details related thereto are fully understood. 4 Training relating to product/service and processes is undertaken where necessary. 5 Operational boundaries are discussed and agreed. 6 Technology to be utilised is identified and most effective use determined. 7 Sales targets are identified and agreed. 8 Fulfilment processes are discussed, understood and agreed.
2 Conduct campaign	1 Telephone calls are identified from data base. 2 Calls are made in the most efficient manner possible. 3 Call guide is followed in accordance with enterprise policies and procedures. 4 Call principles are followed in accordance with enterprise policy. 5 Customer queries are answered or referred to appropriate person in accordance with enterprise policy. 6 Opportunities for needs based selling are taken where appropriate. 7 Work is undertaken in manner which is safe to self and to fellow workers.

3	Complete sales	1 Details of sale are recorded as per enterprise policy. 2 Payment arrangements are discussed and agreed with customer and actioned in accordance with enterprise policy. 3 Customers are advised as to payment methodology and address for payment where necessary. 4 Credit card details are recorded and verified with customer where appropriate. 5 Delivery arrangements where applicable, are discussed and agreed with the customer and recorded and actioned. 6 Privacy requirements are fully applied during the transaction.
4	Record campaign results	1 Recorded outcomes are collated and presented in accordance with enterprise policy. 2 Difficulties encountered are recorded, reported and actioned in accordance with enterprise policy. 3 Performance against agreed targets is assessed and analysed for future improvement. 4 Data base is amended where applicable.

RANGE OF VARIABLES

A call centre is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Telemarketing campaigns may be related to fundraising, product sales and service.

Data base may be enterprise records, telephone directories, business directory, sales records.

Call guide is pre prepared either by the enterprise or external organisations consulting to the enterprise.

Operational boundaries relate to the bounds within which the telemarketer can operate–freedom to deviate from the call guide, limits of interchange with the customer.

Technology could be telecommunications based (e.g. telephone, business system, PABX) or interactive medium and information based (e.g. computer).

Records are specific to the enterprise and may take the form of paper, prepared form, electronic–computer.

Payment arrangements may be credit card, cheque, money order, cash, payment on delivery.

Credit Card details may be card holder details, card number, expiry date.

Delivery arrangements may include delivery address, time of delivery, arrangements for when householder not in attendance, payment on delivery details.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Privacy details cover name and address of purchaser, credit card details and item purchased.

Privacy is covered by the privacy act and relevant enterprise policy.

Sales targets may relate to calls achieved, sales made, sales to calls ratio.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety legislation
- Freedom of information
- Environment
- Consumer Protection
- Credit

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications computer equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Meeting of agreed call/sales ratios.
- Achievement of sales targets.
- Accurate application of pre prepared call guide.
- Accurate recording of sales, payment and delivery arrangements.
- Successful handling of difficulties incurred during campaign.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC005 Customer Service Skills
KC013 Calling Principles
SC014 Voice Technique
SC015 Empathy
SC016 Listening Skills
SC020 Innovative Skills
SC022 Influencing
SC029 Selling Skills
KC031 Marketing Principles and Practice
KC034 Credit Techniques
KC037 Consumer Protection
SC040 Teamwork
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**2**

STREAM Call Centres

FIELD Market Research

UNIT **ICTTC209A - Conduct data collection for market research, opinion polls, customer surveying**

This unit applies to conduct of data collection for research activities by telephoning people on a data base and using a call guide.

Prerequisite Units
Assumes ICTTC204A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify research/survey details	1 Research/ survey questions are studied and questioned where details are unclear. 2 Prepared call guide is studied and fully understood. 3 Operational boundaries are discussed and agreed. 4 Technology to be utilised is identified and most effective use determined. 5 Fulfilment processes are discussed, understood and agreed. 6 Call targets are identified and agreed.
2 Plan data collection for research/survey	1 Appropriate data base is accessed. 2 Prospective research/survey calls are identified from data base. 3 Calling strategy is determined.
3 Conduct data collection for research/survey	1 Calls are made in the most efficient manner possible. 2 Call guide is followed in accordance with enterprise policies and procedures. 3 Call principles are followed in accordance with enterprise policy. 4 Customer availability and willingness to participate in research/survey is ascertained. 5 Customer is informed of survey details, purpose and approximate time survey will take. 6 Customer responses are recorded accurately on the provided forms. 7 Customer queries are answered or referred to appropriate person in accordance with enterprise policy. 8 Work is undertaken in a manner that is safe to self and to fellow workers.

4 Record campaign results	1 Recorded outcomes are collated and presented in accordance with enterprise policy. 2 Difficulties encountered are recorded, reported and actioned in accordance with enterprise policy. 3 Performance against agreed targets is assessed and analysed for future improvement. 4 Data base is amended where applicable.

RANGE OF VARIABLES

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- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

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  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Market Research may relate to product, service.

Opinion Polls gather population opinion on any range of matters and may be brief relating to a particular matter or extensive covering a range of matters.

Customer Surveys gather feedback from customers on a range of matters relating to product/service.

Data base may be enterprise records, telephone directories, business directory, sales records.

Call guide is pre prepared either by the enterprise or external organisations consulting to the enterprise.

Operational boundaries relate to the bounds within which the telemarketer can operate–freedom to deviate from the call guide, limits of interchange with the customer.

Technology could be telecommunications based (e.g. telephone, business system, PABX) or interactive medium and information based (e.g. computer).

Records are specific to the enterprise and may take the form of paper, prepared form, electronic–computer.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Consumer Protection

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications computer equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
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- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Meeting of agreed call/data collection targets.
- Accurate application of pre prepared call guide.
- Accurate recording of data collection outcomes.
- Successful handling of difficulties incurred during campaign.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
KC013 Calling Principles
SC014 Voice Technique
SC015 Empathy
SC016 Listening Skills
SC018 Negotiation Skills
SC022 Influencing
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards
KC115 Data Collection Techniques for Market Research Approaches

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Selling

UNIT **ICTTC210A - Process sales of limited product/service from incoming inquiries**

This unit applies to processing of sales inquiries from customers for limited/basic product/service

Prerequisite Units
Assumes core competency units

Equivalent Units
Recognition for this unit can be given on demonstration of competency against unit WRRS1A in the Retail Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Identify customer needs	1 Customer's needs are clearly established. 2 Customer records are accessed in the case of an existing client. 3 Product/service matching customer needs is identified, presented to the customer. 4 Customers are fully informed as to product/service price. 5 Customer inquiry is referred to appropriate person/area in accordance with enterprise policy where customer need cannot be satisfied. 6 Sales principles are followed as per enterprise policy. 7 Customer objections are managed effectively as required.
2 Close sales	1 Product/service to be purchased is agreed with the customer. 2 Payment options are discussed and agreed with customer. 3 Customers are advised as to payment methodology and address for payment where necessary. 4 Credit card details are recorded and verified with customer where appropriate. 5 Credit checks are arranged where enterprise policy requires. 6 Delivery/installation arrangements are discussed and agreed with the customer and actioned. 7 Privacy requirements are fully applied during the transaction. 8 Opportunities for further sales are identified and brought to notice in accordance with enterprise policy.

3 Input sales records	1 Details relating to sale are fully recorded on enterprise systems. 2 Existing customer records are amended where appropriate. 3 Invoices are raised where required. 4 Delivery/installation details are recorded in accordance with enterprise policy. 5 Performance against agreed targets is assessed and analysed for future improvement. 6 Work is undertaken in manner which is safe to self and to fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

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- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers

- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Sales may relate to product/service purchase/provision, upgrade of existing product/service, amendments to previous sale arrangements.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Referral procedures will vary from enterprise to enterprise.

Payment arrangements may be credit card, cheque, money order, cash, payment on delivery, direct debit.

Credit Card details may be card type, card holder details, card number, expiry date.

Credit checks may be automated or undertaken by sales person or by specialist staff within the enterprise.

Delivery/installation arrangements may include delivery address, time of delivery, arrangements for when householder not in attendance, payment on delivery details.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Privacy details cover name and address of purchaser, credit card details and item purchased.

Privacy is covered by the privacy act and relevant enterprise policy.

Invoices are enterprise specific and normally electronically generated in response to appropriate commands entered into the system.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Consumer Protection
- Credit

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications computer equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Clear and precise understanding of customer needs.
- Matching of product/service to customer need.
- Prices relating to product/service offered are clearly explained and understood by the customer.
- Application of appropriate credit check.
- Arrangement of customer payment.
- Agreement with customer as to payment and delivery arrangements.
- Identification and notification of further sales opportunities as they are presented.
- Accurate recording of sales, payment and delivery arrangements.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
SC016 Listening Skills
SC017 Interpersonal Skills
SC029 Selling Skills
KC030 Sales Principles
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Selling

UNIT **ICTTC211A - Process sales of complex product/service where customer is unsure of available solutions**

This unit applies to processing of sales inquiries from customers for complex product/service range, where options available are many and/or the customer is unsure of available solutions to match need.

Prerequisite Units
Assumes ICTTC210

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify customer needs	1 Customers are questioned in detail as to requirements. 2 Actual customer needs are verified and agreed with the customer. 3 Customer records are accessed in the case of an existing client. 4 Available product/service options are identified and presented to the customer. 5 Benefits of the various options are fully explained. 6 Objections are managed effectively using product/ service benefits. 7 Product/service pricing structures are fully explained to the customer. 8 Customers are given full opportunity to question options/prices offered. 9 Need for an on site visit by salesman/consultant is determined at an appropriate point in the inquiry. 10 Appointment for an on site visit is agreed with the customer where required. 11 Customer inquiry is referred to appropriate person/area in accordance with enterprise policy where customer need cannot be satisfied. 12 Sales principles are followed in accordance with enterprise policy.
2 Close sales	1 Product/service to be purchased is agreed with the customer. 2 Payment options are discussed and agreed with customer. 3 Customers are advised as to payment methodology and address for payment where necessary. 4 Credit card details are recorded and verified with customer where appropriate. 5 Credit checks are arranged where enterprise policy requires.

	6 Delivery/installation arrangements are discussed and agreed with the customer and actioned.
	7 Privacy requirements are fully applied during the transaction.
	8 Opportunities for further sales are identified and brought to notice in accordance with enterprise policy.
3 Input sales records	1 Details relating to sale are fully recorded on enterprise systems.
	2 Existing customer records are amended where appropriate.
	3 Invoices are raised where required.
	4 Delivery/installation details are organised in accordance with enterprise policy.
	5 Performance against agreed targets is assessed and analysed for future improvement.
	6 Work is undertaken in manner which is safe to self and to fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

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- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Sales may relate to product/service purchase/provision, variation to existing product/service, upgrade of current product/service, amendments to previous sale arrangements.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Product/service options may relate to different products/service which will meet the customer's needs, product model, pricing differentials, product/service types.

Referral procedures will vary from enterprise to enterprise.

Payment arrangements may be credit card, cheque, money order, cash, payment on delivery, direct debit.

Credit Card details may be card type, card holder details, card number, expiry date.

Credit checks may be automated or undertaken by sales person or by specialist staff within the enterprise.

Delivery/installation arrangements may include delivery address, time of delivery, arrangements for when householder not in attendance, payment on delivery details.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Privacy details cover name and address of purchaser, credit card details and item purchased.

Privacy is covered by the privacy act and relevant enterprise policy.

Invoices are enterprise specific and normally electronically generated in response to appropriate commands entered into the system.

Customer satisfaction is measured through formal surveys or informally through available indicators such as complaint levels and direct feedback.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Consumer Protection
- Credit

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Identification and verification of customer needs.
- Matching of product/service to customer need and full presentation of available options.
- Benefits of products/service are fully explained to the customer.
- Pricing structures relating to product/service offered are clearly explained and understood by the customer.
- Timely organisation of either on site visit or referral to appropriate enterprise person.
- Achievement of sales targets.
- Application of appropriate credit check.
- Arrangement of customer payment.
- Agreement with customer as to payment and delivery arrangements.
- Identification and notification of further sales opportunities as they are presented.
- Accurate recording of sales, payment and delivery arrangements.
- Achievement of customer satisfaction.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC005 Customer Service Skills
SC016 Listening Skills
SC017 Interpersonal Skills
SC018 Negotiation Skills
SC021 Initiative Skills
SC022 Influencing
SC028 Problem Solving Skills
SC029 Selling Skills
KC030 Sales Principles
SC033 Financial Skills
SC040 Teamwork
SC042 Conflict Resolution
KC044 Identification of Signals by the Customer
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Selling

UNIT **ICTTC212A - Process sales which commit both customer/enterprise to considerable financial commitment**

This unit applies to processing of sales inquiries from customers with a large range of variables available to meet customer need and that commit both the enterprise and the customer to considerable financial outlay

Prerequisite Units
Assumes ICTTC211A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify customer needs	1 Customers are questioned in detail as to requirements. 2 Actual customer needs are verified and agreed with the customer. 3 Customer records are accessed in the case of an existing client. 4 Technical/specialist advice is offered to the customers where such advice is considered beneficial to the closing of the sale and customer understanding and decision making. 5 Customer's financial limitations are ascertained. 6 Estimates/quotes are fully discussed with specialist staff prior to submission to customer. 7 Estimates/quotes are prepared and presented and discussed with the customer. 8 Benefits of the various options are fully explained. 9 Product/service pricing structures are fully explained to the customer. 10 Customers are given full opportunity to question options/quotes provided. 11 Advantages of dealing with particular enterprise are promoted. 12 Customer objections are managed effectively through the promotion of customer specific benefits.
2 Close sales	1 Product/service to be purchased is agreed with the customer. 2 Customer's decision as to purchase arrangements is clearly established. 3 Documentation relating to sale is finalised and forwarded to customer for agreement and appropriate signature.

		4 Method of payment is successfully negotiated and arranged with the customer.
		5 Appropriate credit checks are initiated and results discussed with customer.
		6 Delivery/installation arrangements are discussed and agreed with the customer and recorded.
		7 Privacy requirements are fully applied during the transaction.
3	Input sales records	1 Details relating to sale are fully recorded on enterprise systems.
		2 Existing customer records are amended where appropriate.
		3 Invoices/payment arrangements are initiated in accordance with enterprise policy.
		4 Delivery/installation details are organised in accordance with enterprise policy.
		5 Performance against agreed targets is assessed and analysed for future improvement.
		6 Performance against agreed targets is assessed and analysed for future improvement.
4	Provide sales support where required	1 Verification of customer satisfaction is sought after delivery/installation.
		2 All available data as to any sales problem and action taken to date is established.
		3 Customer is further questioned where necessary.
		4 Options to satisfy customer need are identified and presented.
		5 Action to initiate resolution of problem is enacted in an efficient and timely manner.

RANGE OF VARIABLES

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- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Sales may relate to product/service purchase/provision, variation to existing product/service, upgrade of current product/service, amendments to previous sale arrangements.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Product/service options may relate to different products/service which will meet the customer needs, product model, pricing differentials, product/service types, product/service mixes.

Technical/specialist advice would normally be provided by product/service specialist engineer/provisioning/marketing staff.

Estimates/quotes may be prepared alone or in conjunction with specialist staff.

Payment arrangements may be credit card, cheque, money order, cash, payment on delivery, direct debit.

Credit Card details may be card type, card holder details, card number, expiry date.

Credit checks may be automated or undertaken by sales person or by specialist staff within the enterprise.

Delivery/installation arrangements may include delivery address, time of delivery, arrangements for when householder not in attendance, payment on delivery details.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Privacy details cover name and address of purchaser, credit card details and item purchased.

Privacy is covered by the privacy act and relevant enterprise policy.

Invoices are enterprise specific and normally electronically generated in response to appropriate commands entered into the system.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Identification and verification of customer needs.
- Obtaining of specialist advice to the advantage of enterprise in meeting customer needs.
- Matching of product/service to customer need and full presentation of available options.
- Accurate provision of estimates/quotes.
- Benefits of products/service are fully explained to the customer.
- Promotion of enterprise in dealings with the customer.
- Pricing structures relating to product/service offered are clearly explained and understood by the customer.
- Negotiation of payment and financing arrangements with the customer.
- Achievement of sales targets.
- Agreement with customer as to payment and delivery arrangements.
- Identification and notification of further sales opportunities as they are presented.
- Accurate recording of sales, payment and delivery arrangements.
- Achievement of customer satisfaction.
- Provision of specialist sales support to sales staff.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC016 Listening Skills
SC017 Interpersonal Skills
SC018 Negotiation Skills
SC021 Initiative Skills
SC022 Influencing
SC023 Tenacity
SC028 Problem Solving Skills
SC029 Selling Skills
KC030 Sales Principles
KC031 Marketing Principles and Practice
SC039 Networking Skills
SC040 Teamwork
SC042 Conflict Resolution
KC043 Analytical Thinking
KC044 Identification of Signals by the Customer
KC049 Estimate/Quoting Procedures
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC067 Operational Environment: Pricing Policies
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Customer Support/Assistance

UNIT **ICTTC213A - Provide support and assistance to customers relating to a particular product/service**

This unit applies to handling of the basic inquiries from customers related to provision and maintenance of a particular enterprise product and/or service. Support provided at this level would normally be in a "hotline" type environment where a special access number is allocated to a specific product/service.

Prerequisite Units
Nil

Equivalent Units
Recognition for this unit can be given on demonstration of competency against unit WRRCS3A in the Retail Training Package

ELEMENT	PERFORMANCE CRITERIA
1 Identify and clarify customer inquiry	1 Customer is queried for information related to inquiry. 2 Type of assistance required by the customer is determined. 3 Customer records are accessed where required and available. 4 Further information is sought from the customer where needed.
2 Satisfy customer need	1 Further information is sought from the customer where needed. 2 Systems are activated to provide information where required. 3 Relevant specialist advice is accessed prior to satisfying customer requirements where required. 4 Customer is kept informed as to progress when further information is sought. 5 Inquiry is escalated where solution is complex or affects enterprise policy. 6 Where delays occur, customer is offered call back service at a time convenient to both parties. 7 Work is undertaken in a manner which is safe to self and fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers, or suppliers
- requirements of the environment of the specific operational organisation unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding/service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Support and assistance may relate to assistance with product use, information relating to enterprise product/services, product/service costs, after sales support, warranty details and information, service timing/timetables.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Information may be obtained from enterprise systems, customer records, operational manuals.

Escalation procedures will vary from enterprise to enterprise.

Customer inquiries may be satisfied by activation of relevant technology such as computerised voice responses.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Accurate identification and verification of customer need.
- Provision of effective and timely support and assistance in satisfying customer need.
- Accessing systems/manuals to determine answer to customer inquiry.
- Activation of systems to provide information/assistance where required.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
KC026 Basic Problem Solving
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC057 Enterprise Information Systems
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards
KC110 Stress Management Awareness
KC111 Workplace Ergonomics
KC112 Overview of Call Centre Operations

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**1**

STREAM Call Centres

FIELD Customer Support/Assistance

UNIT **ICTTC214A - Process general inquiries from customers and provide associated support and assistance**

This unit applies to handling of general inquiries from customers related to provision and maintenance of an enterprise product and/or service. It involves follow up with the customer on satisfaction of support provided

Prerequisite Units
Assumes ICTTC213A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify and clarify customer inquiry	1 Customer is queried for information related to inquiry. 2 Type of support/assistance/information required by the customer is determined. 3 Customer records are accessed where required. 4 Further information is sought from the customer where needed.
2 Satisfy customer need	1 Information required by the customer is accessed and provided in an efficient and timely manner. 2 Possible options to resolve inquiry are determined. 3 Access to relevant specialist advice is sought as appropriate. 4 Systems/manuals are researched to locate information sought. 5 Information is provided to the customer in a clear and concise manner. 6 Inquiry is referred to appropriate person/area where solution is complex or affects enterprise policy. 7 Customer is informed of referral details. 8 Work is undertaken in manner which is safe to self and to fellow workers.
3 Follow up customer on inquiry resolution	1 Contact is made with the customer to ensure satisfaction with support/assistance provided. 2 Further information is provided if necessary. 3 Contracts are struck with customer to undertake further research where dissatisfaction occurs.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies – product sales and marketing, customer service and account inquiries, directory services, call assistance
- Computer software and hardware companies – product sales and information, product and customer support
- Banking sector – marketing services, customer funds transfer, loan applications, customer service
- Insurance companies – customer service, product sales, new policy applications, renewals
- Retailers and Suppliers – marketing services and product, after sales support, dealer care, product sales and delivery
- Travel industry – reservations, information, customer support, loyalty programs
- Market research companies
- Charity organisations – financial support and product sales
- Mercantile Agencies
- Credit reporting bureaus
- Government organisations – government service inquiries, government benefit issues

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
- procedures and standards specified by process owners, customers or suppliers.
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products.

Support and assistance may relate to assistance with product use, information relating to enterprise product/services, product/service costs, after sales support, warranty details and information, service timing/timetables

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems

Information may be obtained from enterprise systems, customer records, operational manuals

Specialist staff may be designated technical, engineering, sales, marketing staff

Referral procedures will vary from enterprise to enterprise

Referral details may include name and/or designation of specialist person, time of call back and nature of further information

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety legislation
- Freedom of information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Accurate identification and verification of customer need.
- Accessing systems/manuals to determine answer to customer inquiry.
- Identification of specialist support within the enterprise.
- Consideration of options for meeting inquiry.
- Provision of effective and timely support and assistance in satisfying customer need.
- Activation of systems to provide information/assistance where required.
- Effective follow up of customer, post inquiry.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC005 Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
KC028 Problem Solving Skills
SC040 Teamwork
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work role and Relationships
KC056 Enterprise Organisational Structure
KC057 Enterprise Information Systems
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Customer Support/Assistance

UNIT **ICTTC215A - Provide support to staff and customers on inquiries/matters defending enterprise policy**

This unit applies to what is generally termed the 'help desk' function and describes the competencies associated with the provision of support and assistance to both staff and customers on the very complex inquiries and on issues related to enterprise policy.

Prerequisite Units
Assumes ICTTC214A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Receive and respond to queries	1 Customer/staff inquiry is received and analysed. 2 Action taken to date is ascertained. 3 Customer records are scanned where necessary. 4 Further information is sought from the customer where needed. 5 Work is undertaken in manner which is safe to self and to fellow workers.
2 Satisfy inquiry	1 Possible options to resolve inquiry are determined and discussed with staff member where appropriate. 2 Specialist advice is sought where necessary. 3 Systems/manuals are researched to locate information sought. 4 Decision as to action to be taken/advice to be given is made in conjunction with staff member. 5 Assistance is provided in relaying decision to customer and direct negotiations with customers are undertaken where deemed necessary. 6 Customer attitude to response is assessed.
3 Deal directly with customers in the defence of enterprise actions	1 Customers are contacted in the event of difficulties/ errors made by the enterprise. 2 Enterprise action is fully explained to the customer. 3 Appropriate apologies are given if required. 4 Actions taken or to be taken to correct the situation are discussed and agreed with the customer. 5 Compensatory action sought by the customer is noted and brought to attention of designated enterprise area.
4 Negotiate with customers whose	1 Variation between need and policy is examined.

	needs cannot be met because of enterprise policy	
		2 Possibility of policy change is explored.
		3 Options to meet customer needs within policy bounds are explored and discussed as appropriate with specialist staff.
		4 Customers are advised of enterprise policy and alternatives to meeting need are discussed.
		5 Decisions on action to be taken are made in conjunction with both customer and specialist staff.
		6 Appropriate apologies are provided where customer need cannot be met.
5	Follow up customer on inquiry resolution	1 Customers are contacted after the event to determine satisfaction with support/assistance provided.
		2 Further information/assistance is provided to the customer if necessary.
		3 Contracts are struck with customer to undertake further research where dissatisfaction occurs.
6	Analyse staff actions and level of customer support and identify training needs as appropriate	1 Level of action and support/assistance provided to customer is assessed.
		2 Need for further staff training is organised or provided.
		3 Feedback is sought from staff as to confidence, expertise required in dealing with problem.
		4 Staff mentoring and coaching is provided both during and after customer incident.
		5 Provision of up to date manuals/instructions is verified and corrected as necessary.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets.
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Help Desk function exists in most enterprises and may be undertaken by specialist staff or as part of the leadership/managerial role.

Support and assistance may relate to assistance with product use, information relating to enterprise product/services, product/service costs, after sales support, warranty details and information, service timing/timetables.

Support may be provided to both staff and customers. It is considered beneficial that original customer contact staff deal to finality with the inquiry. In those cases, the help desk operator provides support and assistance to the staff member.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Information may be obtained from enterprise systems, customer records, operational manuals.

Specialist staff may be designated technical, engineering, sales, marketing staff within the enterprise.

Enterprise actions may be non-provision of product/service, delays in delivery or provision of product/service, operational errors, emergencies, staff attitude, system failures.

Provision of **compensatory action** and type provided is dependent entirely on enterprise policy.

Apologies provided to customer are also dependent on policy of each particular enterprise.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Development of options for meeting inquiry.
- Identification of specialist support within the enterprise.
- Support provided both to staff member and the customer.
- Successful negotiation with customer and satisfaction of customer need.
- Successful defence of enterprise actions.
- Satisfactory negotiation with customer to overcome problems caused.
- Effective follow up of customer satisfaction post inquiry.
- Coaching and mentoring of staff.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC018 Negotiation Skills
SC022 Influencing
SC023 Tenacity
SC024 Persuasion
SC029 Selling Skills
SC040 Teamwork
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC057 Enterprise Information Systems
KC058 Enterprise Customer Service Policy
KC064 Enterprise Protocols Associated with Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC069 Operational Systems and Technology
SC070 Mentoring Skills
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**3**
7 Using Technology	**2**

STREAM Call Centres

FIELD Product/Service Faults

UNIT **ICTTC216A - Action reports of faults reported by customers relating to specific product/service**

Product/service faults are normally received within the customer service/call centre environment. The call centre operative has a responsibility to record the fault and organise appropriate repair.
Fault reports received at this level would normally be in a 'hotline' type environment where a special access number is allocated to a specific product/service.

Prerequisite Units
Assumes core competency units

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Receive fault report	1 Fault report is received and verified with the customer. 2 Fault details are recorded to accurately reflect the information provided by the customer. 3 System is interrogated to capture customer product/service information and previous fault history. 4 Warranty and service agreements are identified and coverage established. 5 Customer details recorded on enterprise systems are verified and confirmed with the customer.
2 Resolve customer difficulties	1 Advice is provided to customer as to repair action necessary where appropriate. 2 Action is initiated to arrange repair. 3 Customers are advised of repair charges. 4 Appointments are arranged and agreed between the parties in the event of site visit. 5 Faults are assigned to specialist staff using appropriate decision tools and systems. 6 Work is undertaken in manner which is safe to self and to fellow workers.
3 Complete fault records	1 Customer records are amended as required. 2 Fault history record is updated. 3 Fault clearance details are obtained and entered on the system.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers.
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **fault** is an occurrence that degrades the level of service a customer should experience from enterprise product, equipment or service.

A **fault report** is the notification by a customer that the product/service has been rendered unusable or unsatisfactory because it does not meet specification.

Repair may be undertaken in enterprise workshop environment, vendor workshop or on site.

Service assurance obligations include but are not limited to those prescribed in warranties, contracts and basic service agreements.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

After hours repair is determined by relevant service agreements and/or enterprise policy in relation to repair priorities and specialist staff availability.

Specialist staff may be enterprise staff, product/service 'experts', or contract staff.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements Including Registered Enterprise Agreements
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Uses effective communication skills to determine nature of fault.
- Accurately provides all relevant data to person to which the fault has been allocated.
- Maintains effective communication links with customers at all times.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC040 Teamwork
KC050 Enterprise Policies, Procedures and Guidelines
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC059 Enterprise Fault Repair Policy
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems And Technology
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**2**

STREAM Call Centres

FIELD Product/Service Faults

UNIT **ICTTC217A - Action reports of product/service faults reported by customers**

Product/service faults are normally received within the customer service/call centre environment. The call centre operative has a responsibility to record the fault and organise appropriate repair.

Prerequisite Units
Assumes core competency units

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Receive fault report	1 Fault report is received and verified with the customer. 2 Fault details are recorded to accurately reflect the information provided by the customer. 3 Systems are interrogated to capture customer product/service information and previous fault history. 4 Warranty and service agreements are identified and coverage established. 5 Customer details recorded on enterprise systems are verified and confirmed with the customer.
2 Perform analysis and tests of customer product/service where practicable	1 Cause of fault/problem is verified with customer to ensure enterprise responsibility. 2 Relevant tests are performed to identify nature of fault and likely action needed. 3 Appropriate specialists are consulted if fault analysis is inconclusive.
3 Resolve customer difficulties	1 Appropriate specialists are consulted if fault analysis is inconclusive. 2 Advice is provided to customer as to repair action necessary where appropriate. 3 Action is initiated to arrange repair. 4 Customers are advised of likely repair charges. 5 Repair priorities are determined. 6 Need for staff call out is determined and initiated where appropriate.

		7 Appointments are arranged and agreed between the parties in the event of site visit.
		8 Faults are assigned to specialist staff using appropriate decision tools and systems.
4	Provide feedback to the customer during and at the completion of the repair process	1 Feedback calls are made to customers as required.
		2 Customer satisfaction with progress and/or repair is determined.
		3 Outstanding issues that customers are not satisfied with are recognised and resolved.
5	Complete fault records	1 Customer records are amended as required.
		2 Fault history record is updated.
		3 Fault clearance details are obtained and entered on the system.
		4 Work is completed in a manner safe to self and fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers.
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **fault** is an occurrence that degrades the level of service a customer should experience from enterprise product, equipment or service.

A **fault report** is the notification by a customer that the product/service has been rendered unusable or unsatisfactory because it does not meet specification.

Decision tools may include: decision 'trees', matrices, flowcharts.

Repair may be undertaken in enterprise workshop environment, vendor workshop or on site.

Service assurance obligations include but are not limited to those prescribed in warranties, contracts and basic service agreements.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

After hours repair is determined by relevant service agreements and/or enterprise policy in relation to repair priorities and specialist staff availability.

Specialist staff may be enterprise staff, product/service 'experts', or contract staff.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements Including Registered Enterprise Agreements
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Uses effective communication skills to determine nature of fault.
- Interrogates system effectively to gain data relevant to the fault.
- Determines where fault resolution should rest.
- Accurately determines fault priority.
- Accurately provides all relevant data to person to which the fault has been allocated.
- Maintains effective communication links with customers at all times.
- Organises efficient and effective feedback.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge
Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*
SC002 Oral And Written Communication Skills
SC005 Customer Service Skills
KC027 Problem Solving Processes
SC028 Problem Solving Skills
SC040 Teamwork
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC056 Enterprise Organisational Structure
KC059 Enterprise Fault Repair Policy
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Product/Service Faults

UNIT **ICTTC218A - Negotiate with customers on major product/service faults**

This unit recognises the role in dealing with customers where a major fault and/or service difficulty occurs

Prerequisite Units
Assumes ICTTC217A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify major fault and/or service difficulty	1 Fault patterns are observed to identify wider problem. 2 Customer complaints are examined to identify trends. 3 Details of product faults are notified by enterprise staff. 4 Details relating to service/system outages are notified.
2 Determine impact of fault/service difficulty	1 Enterprise area responsible for problem is contacted to ascertain extent and nature of problem. 2 Details relating to fault/service difficulty are analysed for impact on customers. 3 Customer data bases are interrogated to identify customers affected. 4 Action planned to rectify fault/service difficulty is ascertained.
3 Plan action to inform customers	1 Available options for informing customers are assessed. 2 Decision as to information to be provided to customers is made in conjunction where necessary with specialist staff. 3 Strategies including resource allocation are developed for informing customers in the most efficient and timely manner possible. 4 Priority customers are identified. 5 Customer service agreements are researched and action initiated to avoid breaking of contractual arrangements where applicable. 6 Breaches of agreements are notified to the appropriate area for decision as to planned action. 7 Need for staff call out is determined and initiated where appropriate.

4	Inform customers of planned action	1	Advice is provided to customers as to problem and planned repair action.
		2	Customer difficulties caused by the fault/service difficulty are discussed with the customer and alternative arrangements negotiated and agreed where possible.
		3	Customer needs that cannot be resolved are noted and brought to the attention of the appropriate enterprise organisational unit.
		4	Appointments are arranged in the event of site visit.
		5	Appropriate apologies are provided.
		6	Actions necessary as a result of service agreement breaches are negotiated and agreed with the customer.
		7	Appropriate parties are notified of customer reaction and needs where a negotiated position cannot be reached.
5	Process incoming reports/complaints resulting from major fault and/or service difficulty	1	Nature of the fault/difficulty is discussed with the customer.
		2	Fault/difficulty is analysed to ensure that it is related to identified major fault/service difficulty.
		3	Faults not allied to known fault/service difficulty are processed in accordance with enterprise policy.
		4	Checks are made that the particular complainant has been identified as an affected customer.
		5	Customer is informed of planned action and special needs are negotiated where required.
		6	Work is undertaken in manner which is safe to self and to fellow workers.
6	Provide feedback to the customer during and at the completion of the repair process	1	Feedback calls are made to customers as required.
		2	Customer satisfaction with progress and/or repair is determined.
		3	Outstanding issues that customers are not satisfied with are recognised and resolved.
7	Follow up customer on inquiry resolution	1	Customers are contacted after the event to determine satisfaction with support/assistance provided.
		2	Further information/assistance is provided to the customer if necessary.
		3	Contracts are struck with customer to undertake further research where dissatisfaction occurs.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers.
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **major fault/service difficulty** is an occurrence which impacts across a whole product, range of products, service/system failures.

Service assurance obligations include but are not limited to those prescribed in warranties, contracts and basic service agreements.

After hours repair is determined by relevant service agreements and/or enterprise policy in relation to repair priorities and specialist staff availability.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Information may be obtained from enterprise systems, customer records, operational manuals.

Specialist staff may be designated technical, engineering, sales, marketing staff within the enterprise.

Enterprise actions may be non provision of product/service, delays in delivery or provision of product/service, operational errors, emergencies, staff attitude, system failures.

Provision of **compensatory action** and type provided is dependent entirely on enterprise policy.

Apologies provided to customer are also dependent on policy of each particular enterprise.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Recognition of fault patterns and trends.
- Prompt and efficient reaction to major fault/service difficulty.
- Recognition of customer impact.
- Efficient and effective interrogation of customer data bases.
- Development of options for dealing with affected customers.
- Identification of specialist support within the enterprise.
- Development of strategies for approaching customers in the quickest and most effective manner.
- Analysis and identification of impact on the enterprise of service agreements with customers.
- Successful negotiation with customer and satisfaction of customer need.
- Successful defence of enterprise actions.
- Satisfactory negotiation with customer to overcome problems caused.
- Regular provision of customer feedback during the repair process.
- Effective follow up of customer satisfaction post repair.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC022 Influencing
SC023 Tenacity
SC025 Self Control
SC028 Problem Solving Skills
SC040 Teamwork
SC042 Conflict Resolution
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC058 Enterprise Customer Service Policy
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**3**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**3**
7 Using Technology	**2**

STREAM Call Centres

FIELD Customer Complaints

UNIT **ICTTC219A - Resolve complaints dealing with specific product/service**

Complaints received at this level would normally be in a 'hotline' type environment where a special access number is allocated to a specific product/service

Prerequisite Units
Assumes core competency units

Equivalent Units
Recognition for this unit can be given on demonstration of competency against unit FNARFS15A of the Finance Training Package **or** unit WRRCS3A of the Retail Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Identify and analyse the complaint to establish the underlying cause	1 The complaint is established through active listening, questioning and empathy. 2 Systems are interrogated to capture data which relates directly to the complaint as stated by the customer. 3 The customer is queried for information related to the complaint and possible cause(s). 4 The underlying cause of the complaint is identified, summarised and agreed with the customer. 5 Work is undertaken in a manner which is safe to self and to fellow workers.
2 Determine and agree appropriate action to resolve the complaint	1 Possible options to resolve the complaint are determined and reviewed within enterprise constraints. 2 Action to resolve the complaint is agreed and confirmed with the customer. 3 The complaint is escalated to the next highest authority in accordance with standard procedures. 4 All data relevant to the complaint is given to person dealing with the escalated complaint. 5 Customer is informed as to further action in the event of further referral including negotiation with customer as to agreed call back arrangements.

RANGE OF VARIABLES

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- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **complaint** is any expression of dissatisfaction with enterprise product and/or service by a customer.

A **customer** is a user, purchaser, or beneficiary of a service, product or process and may be internal or external to the enterprise and may include colleagues.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Active listening involves giving your full attention to the person who is speaking and responding in a way that lets them know you have listened and understood their message as they have intended.

Empathy is the ability to identify oneself mentally and emotionally with, and so understand, the other person.

A **stakeholder** is any person or organisation with an interest or involvement in the implementation of the initiative, product, service, or system and may include:

- managers
- staff members
- unions
- customers
- suppliers

Escalation of a complaint will most often be to a group/team leader or the most appropriate person/area, but may also be as prescribed by the enterprise complaints policy and procedures.

Appropriate records may be paper based, electronic, or there may be no records required at all.

A **commitment** is a promised course of action designed to meet the customer's needs. It includes building rapport, keeping promises, keeping the customer informed, doing it right the first time, owning the customer's request, responding to the customer's request with operational efficiency.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements Including Registered Enterprise Agreements
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met.

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Uses effective communication skills to determine nature of complaint accurately.
- Interrogates system effectively to gain data relevant to the complaint.
- Determines whether the complaint resolution is within capability or should be escalated.
- Satisfies customer complaints within capability, time, quality and cost parameters.
- Initiates escalation procedures in accordance with enterprise policy and practices.
- Accurately provides all relevant data to person to which the problem has been escalated.
- Maintains effective communication links with customers, staff and management.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
KC027 Problem Solving Processes
SC040 Teamwork
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
KC102 Quality And Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Customer Complaints

UNIT **ICTTC220A - Resolve customer complaints**

Customer complaints are normally received within the customer service/call centre environment. The call centre operative has a responsibility to resolve that complaint wherever possible to the satisfaction of the customer or to escalate the problem promptly and efficiently to specialist staff.

Prerequisite Units
Assumes ICTTC219A

Equivalent Units
Recognition for this unit can be given on demonstration of competency against unit FNARFS15A of the Finance Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Identify and analyse the complaint to establish the underlying cause	1 The complaint is established through active listening, questioning and empathy. 2 The impact of the complaint on the customer is assessed to respond appropriately. 3 Systems are interrogated to capture data which relates directly to the complaint as stated by the customer 4 The customer is queried for information related to the complaint and possible cause(s). 5 Previous experience with similar complaints is applied to the situation. 6 Data captured is analysed to provide further information about possible cause(s). 7 The underlying cause of the complaint is identified, summarised and agreed with the customer.
2 Comply with enterprise standards and procedures when resolving complaints	1 An appropriate level of ownership of the customer complaint is demonstrated. 2 Appropriate records are maintained for future reference.
3 Determine and agree appropriate action to resolve the complaint	1 Possible options to resolve the complaint are determined and reviewed within enterprise constraints. 2 A preferred plan of action to resolve the complaint is agreed and confirmed with both the customer and stakeholders. 3 A commitment, made to the customer, is followed through as part of the plan of action.

		4 The complaint is referred to the next highest authority in accordance with standard procedures if necessary. 5 All data relevant to the complaint is given to person dealing with the escalated complaint.
4	Action agreed plan to resolve the complaint	1 Implementation of agreed plan to resolve the complaint is coordinated. 2 Systems and records involved in implementing the plan are actioned. 3 Additional customer information is identified to resolve the complaint. 4 Work is undertaken in manner which is safe to self and to fellow workers.
5	Evaluate and communicate effectiveness of action	1 Implementation of the action plan to resolve the complaint is monitored. 2 Feedback on progress or resolution is provided to the customer. 3 Customer satisfaction, on the resolution of the complaint is determined. 4 Feedback is sought from group/team leader on escalated issues if required.

RANGE OF VARIABLES

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- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **complaint** is any expression of dissatisfaction with enterprise product and/or service by a customer.

A **customer** is a user, purchaser, or beneficiary of a service, product or process and may be internal or external to the enterprise and may include colleagues.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Active listening involves giving your full attention to the person who is speaking and responding in a way that lets them know you have listened and understood their message as they have intended.

Empathy is the ability to identify oneself mentally and emotionally with, and so understand, the other person.

A **stakeholder** is any person or organisation with an interest or involvement in the implementation of the initiative, product, service, or system and may include:

- managers
- staff members
- unions
- customers
- suppliers

Escalation of a complaint will most often be to a group/team leader or the most appropriate person/area, but may also be as prescribed by the enterprise complaints policy and procedures.

Appropriate records may be paper based, electronic, or there may be no records required at all.

A **commitment** is a promised course of action designed to meet the customer's needs. It includes building rapport, keeping promises, keeping the customer informed, doing it right the first time, owning the customer's request, responding to the customer's request with operational efficiency.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements Including Registered Enterprise Agreements
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Uses effective communication skills to determine nature of complaint accurately.
- Interrogates system effectively to gain data relevant to the complaint.
- Determines whether the complaint resolution is within capability or should be escalated.
- Satisfies customer complaints within capability, time, quality and cost parameters.
- Initiates escalation procedures in accordance with enterprise policy and practices.
- Accurately provides all relevant data to person to which the problem has been escalated.
- Maintains effective communication links with customers, staff and management.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC005 Customer Service Skills
SC015 Empathy
KC027 Problem Solving Processes
SC040 Teamwork
SC041 Dealing With Emotion
SC042 Conflict Resolution
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC053 Specific Work Role and Relationships
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Customer Complaints

UNIT **ICTTC221A - Resolve the more complex customer complaints**

This unit describes the resolution of the more complex and spurious complaints related to customer product/service. At this level an operator can be called upon to defend the organisation from undue and unwarranted criticism

Prerequisite Units
Assumes ICTTC220A

Equivalent Units
Recognition of this unit can be given on demonstration of competency against unit FNARFS15A of the Finance Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Receive and respond to complaints	1 Customer complaint is received directly from customer or escalated from another staff member. 2 Customer complaint is received directly from customer or escalated from another staff member. 3 Any action taken to date to resolve the complaint is ascertained and analysed for impact. 4 Systems are interrogated to capture data relevant to the complaint. 5 Work is undertaken in manner which is safe to self and to fellow workers.
2 Develop plans for dealing with complaint	1 Possible options to resolve complaint are determined and discussed with staff member where appropriate. 2 Specialist advice is sought where necessary. 3 Plan of action to resolve the complaint is developed in consultation with others where necessary.
3 Negotiate complaint resolution with customer	1 Action necessary to resolve the complaint is discussed and negotiated with the customer. 2 Agreements reached with the customer are recorded and action taken to action agreement within agreed timeframes. 3 Follow up action is initiated to ensure that agreements with customers are implemented. 4 Full documentation of actions proposed and customer attitude and demands are completed and forwarded to appropriate enterprise organisational unit for further action where agreements cannot be reached with the customer. 5 Appropriate apologies are given where appropriate. 6 Compensatory action sought by the customer is noted and brought to attention of designated enterprise area.

4	Negotiate with customers whose complaints cannot be resolved because of enterprise policy	1 Variation between customer demand/reason for complaint and policy is examined. 2 Possibility of policy change is explored. 3 Options to meet customer needs within policy bounds are explored and discussed as appropriate with specialist staff. 4 Customers are advised of enterprise policy and alternatives overcoming problem (s) are discussed. 5 Decisions on action to be taken are made in conjunction with both customer and specialist staff. 6 Appropriate apologies are provided where customer need cannot be met.
5	Follow up customer on inquiry resolution	1 Customers are contacted after the event to determine satisfaction with support/assistance provided. 2 Further information/assistance is provided to the customer if necessary. 3 Contracts are struck with customer to undertake further research where dissatisfaction still exists.
6	Analyse staff actions and level of customer support and identify training needs as appropriate	1 Level of action and support/assistance provided to customer is assessed. 2 Need for further staff training is organised or provided. 3 Feedback is sought from staff as to confidence, expertise required in dealing with problem. 4 Staff mentoring and coaching is provided both during and after customer incident. 5 Provision of up to date manuals/instructions is verified and corrected as necessary.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

A **complaint** is any expression of dissatisfaction with enterprise product and/or service by a customer.

A **customer** is a user, purchaser, or beneficiary of a service, product or process and may be internal or external to the enterprise and may include colleagues.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Active listening involves giving your full attention to the person who is speaking and responding in a way that lets them know you have listened and understood their message as they have intended.

Empathy is the ability to identify oneself mentally and emotionally with, and so understand, the other person.

Escalation of a complaint will most often be to a group/team leader or the most appropriate person/area, but may also be as prescribed by the enterprise complaints policy and procedures.

A **commitment** is a promised course of action designed to meet the customer's needs. It includes building rapport, keeping promises, keeping the customer informed, doing it right the first time, owning the customer's request, responding to the customer's request with operational efficiency.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Information may be obtained from enterprise systems, customer records, operational manuals.

Specialist staff may be designated technical, engineering, sales, marketing staff within the enterprise.

Provision of **compensatory action** and type provided is dependent entirely on enterprise policy.

Apologies provided to customer are also dependent on policy of each particular enterprise.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Development of options for resolving complaint.
- Efficient and effective interrogation of customer and system records.
- Identification and involvement of specialist support within the enterprise.
- Development of plan of action in dealing with the complaint.
- Satisfactory negotiation with customer to overcome problems caused.
- Development of agreements with the customer to resolve problem.
- Accurate documentation relating to all customer dealings in the event of problem non resolution.
- Effective follow up of customer satisfaction post problem resolution.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC022 Influencing
SC023 Tenacity
SC025 Self Control
SC028 Problem Solving Skills
SC040 Teamwork
SC041 Dealing With Emotion
SC042 Conflict Resolution
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC058 Enterprise Customer Service Policy
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
SC070 Mentoring Skills
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**3**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**3**
7 Using Technology	**2**

STREAM Call Centres

FIELD Credit Management

UNIT **ICTTC222A - Process low risk credit applications**

This unit applies to handling of the more routine credit applications involving established customers and/or small amounts of credit

Prerequisite Units
Assumes core competency units

Equivalent Units
Recognition of this unit can be given on demonstration of competency against unit FNACRM01A of the Finance Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Receive application	1 Application is checked to determine customer details including trading name details and amount of credit required. 2 Customer preferred payment methodology is ascertained. 3 Enterprise system/ records are interrogated to determine whether applicant is an existing customer. 4 Existing customer records are checked for payment history and credit standing.
2 Process application	1 Customer credit rating is ascertained in accordance with enterprise and legislative requirements. 2 Check credit card details with relevant financial institution where applicable. 3 Customer ability to repay any credit advances is checked in establishing credit rating. 4 Determine credit levels and payment terms based on credit rating and amount of credit sought. 5 Negotiate and agree payment arrangements with customer. 6 Difficulties experienced in customer negotiations are referred to the next level in accordance with enterprise policy.
3 Complete administrative arrangements	1 Complete and forward appropriate documentation to the customer. 2 Approve credit arrangements and record details in accordance with enterprise policy and legislative requirements. 3 Agreed payment arrangements are notified in accordance with enterprise procedure.

	4 Customer commitments are regularly monitored and followed up. 5 Outstanding issues relating to credit application are followed up and referred as necessary in an efficient and timely manner. 6 Work is undertaken in manner which is safe to self and to fellow workers.
4 Apply credit management action to outstanding accounts	1 System reports are accessed regularly to determine outstanding accounts. 2 Approval for credit extension is given against enterprise policy for credit management considering customer payment history and credit standing. 3 Intended actions are discussed and agreed with the customer. 4 Customer commitments are followed up on a regular basis.

RANGE OF VARIABLES

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- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Credit management applies to the granting of credit to customers for the purchase, leasing of goods and services. It may relate to purchase/lease of a product or service or borrowings for such an action.

Credit management procedures are unique to an enterprise and are recorded in enterprise policy manuals and procedural documents. Procedures are governed by government legislation and codes of practice.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Referral procedures will vary from enterprise to enterprise.

Payment arrangements may be credit card, cheque, agreed instalments, direct debit.

Credit Card details may be card type, card holder details, card number, expiry date.

Credit application/agreement documentation is unique to the enterprise.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Bankruptcy Act
- Judgment Debt Recovery Act
- Credit Act
- Debtors Act
- Commercial Inquiry Agents Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

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- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Application of enterprise credit procedures.
- Interrogation of systems records to establish payment/credit history.
- Determination of customer capacity to pay.
- Establishment of customer credit rating.
- Negotiation of credit terms and payment arrangements with customers.
- Negotiation and agreement with customer to dissolve outstanding debts.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC005 Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC022 Influencing
SC023 Tenacity
SC025 Self Control
SC028 Problem Solving Skills
KC035 Credit Management Procedures
SC040 Teamwork
SC045 Basic Mathematics
SC046 Basic Accounting Procedures
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC058 Enterprise Customer Service Policy
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Credit Management

UNIT **ICTTC223A - Process high risk credit applications**

This unit applies to handling of credit applications involving large amounts of credit and with customers with no or a poor credit rating. It also involves arrangement of debt recovery.

Prerequisite Units
Assumes ICTTC222A

Equivalent Units
Recognition for this unit can be given on demonstration of competency against unit FNACRM03A **and** FNAACRM04A of the Finance Training Package.

ELEMENT	PERFORMANCE CRITERIA
1 Receive application	1 Application is checked to determine customer details including trading name details and amount of credit required. 2 Enterprise system/ records are interrogated to determine whether applicant is an existing customer. 3 Existing customer records are checked for payment history and credit standing.
2 Determine application	1 Customer credit rating is ascertained in accordance with enterprise and legislative requirements. 2 Customer ability to repay any credit advances is checked in establishing credit rating. 3 Approve application within the bounds of enterprise policy where applicable. 4 Determine credit levels and payment terms based on credit rating and amount of credit sought where approval is to be granted. 5 Negotiate and agree payment arrangements with customer.
3 Negotiate credit application details with customer	1 Non approval of credit application is discussed and explained to the customer. 2 Customers appeal rights are advised where appeal provisions exist. 3 Negotiate and agree payment arrangements with customer where approval granted. 4 Difficulties experienced in customer negotiations are escalated in accordance with enterprise policy.

4 Complete administrative arrangements	1 Complete and forward appropriate documentation to the customer. 2 Organise credit arrangements and record details in accordance with enterprise policy and legislative requirements. 3 Agreed payment arrangements are notified in accordance with enterprise procedure. 4 Customer commitments are regularly monitored and followed up. 5 Outstanding issues relating to credit application are followed up and resolved in an efficient and timely manner. 6 Work is undertaken in manner that is safe to self and to fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

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- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers

- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Credit management applies to the granting of credit to customers for the purchase, leasing of goods and services. It may relate to purchase/lease of a product or service or borrowings for such an action.

Credit management procedures are unique to an enterprise and are recorded in enterprise policy manuals and procedural documents. Procedures are governed by government legislation and codes of practice.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Payment arrangements may be credit card, cheque, agreed instalments, direct debit.

Credit application/agreement documentation is unique to the enterprise.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Bankruptcy Act
- Judgment Debt Recovery Act
- Credit Act
- Debtors Act
- Commercial Inquiry Agents Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Application of enterprise credit procedures.
- Determination of customer capacity to pay.
- Establishment of customer credit rating.
- Determination of credit application.
- Discussion and explanation to customer of non approval.
- Negotiation of credit terms and payment arrangements with customers.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC022 Influencing
SC025 Self Control
SC028 Problem Solving Skills
KC035 Credit Management Procedures
SC040 Teamwork
SC042 Conflict Resolution
SC045 Basic Mathematics
SC046 Basic Accounting Procedures
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC058 Enterprise Customer Service Policy
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Billing Management

UNIT **ICTTC224A - Provide basic assistance to customers in relation to account inquiries**

This unit applies to handling of the basic inquiries from customers related to billing and account matters

Prerequisite Units
Assumes core competency units

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify and clarify customer inquiry	1 Customer inquiry is received and verified by further questioning where applicable. 2 Customer billing records are accessed where required. 3 Further information is sought from the customer where needed.
2 Satisfy customer need	1 Information required by the customer is accessed and provided in an efficient and timely manner. 2 Help is sought in answering inquiry while customer is on the phone where possible. 3 Inquiry is referred to next level where information sought cannot be provided. 4 All documentation relating to the inquiry is recorded and referred promptly where customer cannot be satisfied or as required. 5 Work is undertaken in manner that is safe to self and to fellow workers.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

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- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Account inquiries may include billing item queries, charges and costings, payment date.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Information may be obtained from enterprise systems, customer records, operational manuals.

Escalation procedures will vary from enterprise to enterprise.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Accurate identification and verification of customer inquiry.
- Provision of effective and timely response in satisfying inquiry.
- Accessing and interrogation of billing records, systems, manuals to determine answer to customer inquiry.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

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No. *Item*

SC001 Basic Oral and Written Communication Skills
SC004 Basic Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC026 Basic Problem Solving
KC036 Products and Service Charges
SC040 Teamwork
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC060 Enterprise Billing Procedures
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**1**
3 Planning and Organising Activities	**1**
4 Working With Others and in Teams	**1**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Billing Management

UNIT **ICTTC225A - Process complex billing/account inquiries from customers**

This unit applies to handling of the more complex inquiries from customers related to customer accounts/bills. It involves decision making related to payment extension and payment by instalment

Prerequisite Units
Assumes ICTTC224A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Identify and clarify customer inquiry	1 Customer is queried for information related to inquiry. 2 Type of support/assistance/information required by the customer is determined. 3 Customer records are accessed where required. 4 Further information is sought from the customer where needed.
2 Satisfy customer need	1 Possible options to resolve inquiry are determined. 2 Customer billing records, systems, manuals are researched to locate information sought. 3 Information is provided to the customer in a clear and concise manner. 4 Customer is questioned as to satisfaction of inquiry. 5 Work is undertaken in manner which is safe to self and to fellow workers.
3 Negotiate account payment extensions	1 Reasons for payment time extensions/ instalment payment requests are verified with the customer. 2 Enterprise policy relating to instalment payment/ payment time extension is consulted 3 Customer's credit record and payment history are accessed and used in the decision making process. 4 Negotiations with customer re payment by instalment, time extension are undertaken within the realms of enterprise policy. 5 Enterprise records are amended to reflect the decision relating to instalment payment or time payment extension. 6 Follow up procedures are initiated to ensure agreements reached with the customer are fulfilled. 7 Payment defaulting is referred to the appropriate area within the enterprise.

4 Approve waiver of charges where errors are evident	1 Customer's claims relating to error are verified. 2 Approval is given to waive charges where there is a clear error. 3 Clear and precise explanations are provided to the customer where charges prove to be accurate. 4 Arrangements for submission of a revised bill are initiated in accordance with enterprise policy. 5 Customer billing records and enterprise systems are amended to reflect the amendment.

RANGE OF VARIABLES

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  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Information may be obtained from enterprise systems, customer records, operational manuals.

Complex account inquiries may include multiple billing item queries, discount inquiries, payment arrangements, spurious charges and costings, customer incentive plans.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Information may be obtained from enterprise systems, customer records, operational manuals.

Partial/instalment payment and waiver policy will vary from enterprise to enterprise.

Payment time extension policy will vary from enterprise to enterprise and depends largely on customer's credit rating and payment history.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Accurate identification and verification of customer inquiry.
- Accessing customer billing records, billing systems, enterprise policy manuals to determine answer to customer inquiry.
- Consideration of options for meeting inquiry.
- Accessing of customer credit history and payment records.
- Decision relating to instalment payment and extension payment is within enterprise policy.
- Recognition of billing errors and arrangement of revised bill.
- Negotiation and explanation to customer in the event that a customer claimed error does not exist.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC005 Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC028 Problem Solving Skills
KC036 Products and Service Charges
SC040 Teamwork
SC042 Conflict Resolution
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC060 Enterprise Billing Procedures
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Billing Management

UNIT **ICTTC226A - Handle to finality complex accounts, service severance and/or product return for default**

This unit applies to what is generally termed the 'help desk' function and describes the competencies associated with the processing of the very complex matters relating to customer billing and customer accounting.

Prerequisite Units
Assumes ICTTC225A

Equivalent Units
Nil

ELEMENT	PERFORMANCE CRITERIA
1 Receive and respond to queries	1 Customer/staff inquiry is received and analysed. 2 Action taken to date is ascertained. 3 Customer records are accessed where required. 4 Further information is sought from the customer where needed.
2 Satisfy inquiry	1 Possible options to resolve inquiry are determined and discussed with staff member where appropriate. 2 Specialist advice is sought where necessary. 3 Customer billing records, systems and policy manuals are researched to locate information sought. 4 Decision as to action to be taken/advice to be given is made in conjunction with staff member. 5 Assistance is provided in relaying decision to customer and direct negotiations with customers are undertaken where deemed necessary. 6 Customer attitude to response is assessed. 7 Work is undertaken in manner that is safe to self and to fellow workers.
3 Negotiate with payment defaulters	1 Payment due dates are verified. 2 Customer's credit rating and payment history are accessed. 3 Customer is contacted and reasons for non payment ascertained. 4 Opportunities are offered to the customer to pay within a specified time period as permitted by enterprise policy. 5 Customer's credit standing and payment history are considered when approving payment extension time.

	6 Action is initiated to follow up payment where amended payment date is negotiated. 7 Revised payment date is recorded in appropriate systems/records.
4 Advise defaulting customers of service/product	1 Customers are advised of service/product cancellation. 2 Customers are provided with full details as to cancellation. 3 Negotiation of product/equipment return is undertaken with customer where appropriate. 4 Arrangements are negotiated with customer as to time and location for pick up of product/equipment where required. 5 Debt recovery process is initiated. 6 Customer records are amended in accordance with enterprise procedures.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The operational environment of a call centre operator will vary significantly from enterprise to enterprise and will be influenced by:

- regulatory environment in which the enterprise and/or industry operates
- enterprise policies, procedures, business practices and guidelines, including, but not limited to, those covering:
  - quality management
  - corporate conduct/ethics
  - people
  - health and safety
  - equal employment opportunity
  - escalated service difficulties
  - customer complaints
- procedures and standards specified by process owners, customers or suppliers
- requirements of the environment of the specific operational organisational unit as specified in:
  - business rules
  - accountabilities
  - stress management guidelines
  - ergonomic guidelines
  - authorising delegations
  - service memoranda of understanding / service delivery agreements
  - performance measures
  - targets
- agreed service delivery scope and charter
- the defined environment of the relationship, including:
  - stakeholders
  - business context
  - technology
  - level of complexity of customers and products

Help Desk function exists in most enterprises and may be undertaken by specialist staff or as part of the leadership/managerial role.

Support may be provided to both staff and customers. It is considered beneficial that original customer contact staff deal to finality with the inquiry. In those cases, the help desk operator provides support and assistance to the staff member.

Customer records are normally maintained in a computerised system specific to the enterprise but may take the form of paper/card related systems.

Quality and continuous improvement is defined by the enterprise and can apply to variation, customer service, standards, service delivery, performance, process, productivity, financial, goal setting, resource management.

Information may be obtained from enterprise systems, customer records, operational manuals.

Very complex account inquiries may include challenge of whole account, deferment of payment, default on payment, regular bad debtors.

Product/equipment return depends on enterprise policy and may relate to product/equipment model, age, value, obsolescence.

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Freedom of Information
- Environment
- Credit Act
- Debtors Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Development of options for meeting inquiry.
- Support provided both to staff member and the customer.
- Successful negotiation with customer and satisfaction of customer need.
- Accessing of customer credit history and payment records.
- Decision relating to instalment payment and extension payment is within enterprise policy.
- Negotiation of payment arrangements.
- Negotiation of product/equipment return.
- Debt recovery process is initiated in an efficient and timely manner.
- Projection of a professional image in representing the company.
- Demonstration of all related occupational health and safety requirements and work practices.
- Contributes in a positive manner to the overall improvement of team performance.
- Applies principles of quality and continuous improvement in all operational activities.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC015 Empathy
SC016 Listening Skills
SC017 Interpersonal Skills
SC022 Influencing
SC023 Tenacity
SC025 Self Control
SC028 Problem Solving Skills
KC036 Products and Service Charges
SC040 Teamwork
SC042 Conflict Resolution
KC053 Specific Work Role and Relationships
KC057 Enterprise Information Systems
KC058 Enterprise Customer Service Policy
KC060 Enterprise Billing Procedures
KC064 Enterprise Protocols Associated With Customer Service
KC066 Operational Environment: Customer Base, Company Products and Services
KC068 Operational Systems
KC102 Quality and Continuous Improvement Processes
KC108 Occupational Health and Safety Standards

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**3**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC227A - Manage personal work priorities and professional development**

Team leaders are responsible for managing their own performance and taking responsibility for their professional development within the context of the enterprise.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1301A of the Frontline Management competency *'Manage personal work priorities and professional development.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Manage self	1 Personal qualities and performance serves as a role model in the workplace. 2 Personal goals and plans reflect organisation's plans and personal roles, responsibilities and accountabilities. 3 Action is taken to achieve and extend personal goals beyond those planned. 4 Consistent personal performance is maintained in varying work conditions and work contexts.
2 Set and meet own work priorities	1 Competing demands are prioritised to achieve personal, team and organisation goals and objectives. 2 Technology is used efficiently and effectively to manage work priorities and commitments.
3 Develop and maintain professional competency	1 Personal knowledge and skills are assessed against competency standards to determine development needs and priorities. 2 Feedback from clients and colleagues is used to identify and develop ways to improve competence. 3 Management development opportunities suitable to personal learning style(s) are selected and used to develop competence. 4 Participation in professional networks and associations enhances personal knowledge, skills and relationships. 5 New skills are identified and developed to achieve and maintain competitive edge.

RANGE OF VARIABLES

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- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Organisational culture and values are unique to the enterprise.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Goals and standards placed on each team leader can and will vary from individual to individual and would be influenced by company business objectives, company standards, environment and experience.

Technology used is generally telecommunications and information based. Operating platform may vary but is generally Windows based.

The operational environment of a team leader will vary significantly from enterprise to enterprise and will be influenced by:
- job role–scope, responsibilities
- enterprise policies, guidelines and processes
- level of autonomy
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- productivity and profitability objectives and targets
- best practice and benchmarking principles and practices
- legislation, codes and practice
- resource parameters established
- learning organisation principles and practices
- established and refined personal development strategies

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Performs consistently to achieve goals and results
- Uses information appropriate to work responsibility.
- Monitors and introduces best practice to improve own performance.
- Operates effectively in varying work environments and contexts.
- Uses self diagnosis and continuous improvement processes to enhance quality of personal performance.
- Assesses own performance and learns from experience and feedback.
- Seeks feedback regularly from others on own performance and acts on constructive criticism.
- Handles uncertainty and conflict in a positive manner.
- Engages in self development activities in response to realistic assessment of competence.
- Maintains and extends knowledge of current and future developments in professional/technical field.
- Uses appropriate management information systems to contribute to work performance.
- Selects and uses technology appropriate to the task being performed.
- Displays personal and professional integrity in business relationships.

Skills and Knowledge
Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No.	*Item*
SC002	Oral and Written Communication Skills
SC005	Customer Service Skills
KC027	Problem Solving Processes
KC038	Feedback Mechanisms
KC050	Enterprise Policies, Procedures and Guidelines
KC051	Enterprise Culture and Values
KC052	Enterprise Mission, Business Goals And Standards
KC053	Specific Work Role And Relationships
KC066	Operational Environment: Customer Base, Company Products and Services
KC068	Operational Systems
SC071	Leadership Skills
SC072	Planning
SC085	Goal Setting Skills
SC086	Self Discipline Skills
SC087	Self Analysis Skills
KC103	Continuous Improvement Techniques and Processes

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**1**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**1**
7 Using Technology	**1**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC228A - Provide leadership to call centre staff in achievement of business goals and objectives**

The team leader has an important leadership role in the development of the enterprise. This will be most evident in the manner in which they conduct themselves, the initiative which they take in influencing, assisting and guiding others and in the way they manage their own role and responsibilities.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1402A of the Frontline Management competency *' Provide leadership in the workplace'*. Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Demonstrate high standards of management performance	1 Performance meets the enterprise requirements. 2 Performance serves as positive role model for others. 3 Performance plans are developed and implemented in accordance with the organisation's goals and objectives. 4 Key performance indicators are developed within the teams/ enterprise business plans.
2 Enhance the organisation's image	1 Enterprise standards and values are used in conducting business. 2 Standards and values deemed unacceptable are questioned through established communication channels. 3 Personal performance contributes to developing a reputable organisation which has integrity and credibility.
3 Influence individuals and teams positively	1 Expectations, roles and responsibilities are communicated in a way which encourages individuals/teams to take responsibility for their work. 2 Efforts and contributions of individuals and teams are encouraged, valued and rewarded. 3 Ideas and information gain acceptance and support of team.

4 Make informed decisions	1 Information relevant to the issue(s) under consideration is gathered and organised. 2 Individuals/teams participate actively in the decision making process. 3 Options are examined and the risks assessed to determine preferred course(s) of action. 4 Decisions are timely and communicated clearly to individuals and team. 5 Plans to implement decisions are prepared and agreed with the relevant individuals/team. 6 Feedback processes are used to monitor the implementation and impact of decisions.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Call centre team leaders may lead a team ranging from 1–20 staff.

Organisational culture and values are unique to the enterprise.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Goals and standards placed on each team leader can and will vary from individual to individual and would be influenced by company business objectives, company standards, environment and experience.

Personal presentation may include:
- dress standards, conduct, language, punctuality

The operational environment of a team leader will vary significantly from enterprise to enterprise and will be influenced by:
- job role–scope, responsibilities
- enterprise policies, guidelines and processes
- level of autonomy
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- productivity and profitability objectives and targets
- best practice and benchmarking principles and practices
- resource parameters established
- learning organisation principles and practices
- established and refined personal development strategies

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Achieves planned results.
- Acquires and uses information to the best advantage for achievement of team performance goals.
- Makes decisions appropriate to achievement of team performance goals.
- Explains the organisation's goals, values and objectives.
- Establishes and monitors key performance indicators for individuals and teams.
- Manages work effectively to achieve goals and results.
- Monitors/introduces practices to improve performance.
- Undertakes effective consultation processes.
- Communicates critical information clearly to team, peers and management in an effective manner.
- Promotes available learning methods to support team competence.
- Effectively uses management information systems in the achievement of team performance goals and objectives.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC022 Influencing
KC027 Problem Solving Processes
KC038 Feedback Mechanisms
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC066 Operational Environment: Customer Base, Company Products and Services
SC071 Leadership Skills
SC072 Planning
SC075 Contingency Planning
SC085 Goal Setting Skills
SC086 Self Discipline Skills
SC094 Motivational Skills
KC103 Continuous Improvement Techniques and Processes
SC109 Team Building Skills

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**1**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC229A - Establish and manage effective relationships within the call centre team environment**

Team leaders play an important role in developing and maintaining positive relationships in internal and external environments so that both customers and the enterprise achieve planned outputs/outcomes.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1303A of the Frontline Management competency *' Establish and manage effective workplace relationships.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Gather, convey and receive information and ideas	1 Information to achieve work responsibilities is collected from appropriate sources. 2 Method used to communicate ideas and information is appropriate to the audience. 3 Communication takes into account social and cultural diversity. 4 Input from internal and external sources is sought and valued in developing and refining new ideas and approaches.
2 Develop trust and confidence	1 People are treated with integrity, respect and empathy. 2 Organisation's social, ethical and business standards are used to develop and maintain positive relationships. 3 Trust and confidence of customers, suppliers and colleagues is gained and maintained through competent performance.
3 Build and maintain networks and relationships	1 Networking is used to identify and build relationships. 2 Networks and other work relationships provide identifiable benefits for the team, organisation and customers.
4 Manage difficulties to achieve positive outcomes	1 Problems are identified and analysed, and action taken to rectify the situation with minimal disruption to performance. 2 Team members are given guidance and support to resolve their work difficulties. 3 Continued poor performance is managed within processes agreed within the enterprise.

4 Conflict is managed constructively within the enterprise processes.

5 Difficult situations are negotiated to achieve results which are acceptable to the participants and which meet enterprise and legislative requirements.

RANGE OF VARIABLES

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- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
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- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Call centre team leaders may lead a team ranging from 1–20 staff.

Organisational culture and values are unique to the enterprise.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Teams may be one of or a mixture of the following:
- on-going, project, work based, cross functional

Teams may include:
- full time employees, part time employees, contractors

Team leader may assume varying roles in teams including:
- leader, coach, facilitator, mentor, participant

Team leaders in a call centre environment would not establish teams, team goals and objectives but could be expected participate in such activities

Systems used for performance measurement may be:
- electronic, paper, observation

The team role and responsibility will vary significantly from enterprise to enterprise and will be influenced by:
- enterprise policies, guidelines and processes
- level of autonomy
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- productivity and profitability objectives and targets
- learning organisation principles and practices
- established and refined personal development strategies

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Uses routine information appropriate to work responsibility.
- Manages relationships to achieve goals and results.
- Monitors and introduces ways to improve relationships.
- Works effectively with other team members who have diverse work styles, aspirations, cultures and perspectives.
- Communicates clearly and concisely with individuals and teams.
- Encourages others in the team to openly propose, discuss and resolve issues.
- Analyses problems and barriers to team participation and develops constructive responses.
- Uses effective consultation processes.
- Deals with conflict before it adversely affects team performance.
- Recognises and minimises the language, literary and numeracy barriers in team participation.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
SC017 Interpersonal Skills
SC022 Influencing
KC027 Problem Solving Processes
KC038 Feedback Mechanisms
SC039 Networking Skills
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC066 Operational Environment: Customer Base, Company Products and Services
SC070 Mentoring Skills
SC071 Leadership Skills
SC072 Planning
SC075 Contingency Planning
KC081 Best Practice and Benchmarking Techniques
KC082 Recognition and Reward Strategies
SC085 Goal Setting Skills
SC094 Motivational Skills
SC095 Assessment Skills
SC096 Facilitation Skills
SC097 Delegation Skills
KC103 Continuous Improvement Techniques and Processes
SC109 Team Building Skills

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**1**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC230A - Lead, participate in and facilitate the activities of a call centre work team**

The team leader has a key role in leading, participating in, facilitating and empowering work teams in the achievement of quality customer service and team goals. They play a prominent role in motivating, mentoring, coaching and developing team members and in achieving team cohesion within best practice principles and practices.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1404A of the Frontline Management competency *'Participate in, lead and facilitate work teams.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Participate in team planning	1 Team establishes clearly defined purpose, roles, responsibilities consistent with enterprise goals and objectives. 2 Team performance plan, including performance measures, is established and contributes to the enterprise business plans and objectives. 3 Systems and mechanisms are established to monitor and review team and individual performance within the organisation's continuous improvement processes. 4 Team includes in its plans, ways in which it can benefit from the diversity of its membership.
2 Develop team commitment and cooperation	1 Team uses open communication to obtain and share information. 2 Team encourages and exploits innovation and initiative. 3 Support is provided to the team to develop mutual concern and camaraderie.
3 Participate in and facilitate work team	1 Team effectiveness is encouraged and enhanced through active participation in team activities and communication processes. 2 Individuals and teams are actively encouraged to take individual and joint responsibility for their actions. 3 Problems which impede team performance are identified and resolved by the team, using external assistance as necessary.

4 Manage and develop team performance	1 Team is supported in making decisions within its agreed roles and responsibilities. 2 Results achieved by the team contribute positively to enterprise business plans. 3 Team and individual competencies are monitored regularly to confirm that the team is able to achieve its goals. 4 Mentoring and coaching support is provided to individuals and teams to enhance knowledge and skills. 5 Delegates' performance is monitored and followed up to confirm that they have completed delegation/assignment.

RANGE OF VARIABLES

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Call centres exist across a range of industries and industry sectors. Examples include:
- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Call centre team leaders may lead a team ranging from 1–20 staff.

Organisational culture and values are unique to the enterprise.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Reporting of performance results is particular to the enterprise but may occur:
- daily, weekly, monthly, quarterly, six monthly, annually

Teams may be one of or a mixture of the following:
- on-going, project, work based, cross functional

Teams may include:
- full time employees, part time employees, contractors

Team leader may assume varying roles in teams including:
- leader, coach, facilitator, mentor, participant

Team leaders in a call centre environment would not establish teams, team goals and objectives but could be expected participate in such activities.

Systems used for performance measurement may be:
- electronic, paper, observation

The team role and responsibility will vary significantly from enterprise to enterprise and will be influenced by:
- enterprise policies, guidelines and processes
- level of autonomy
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- productivity and profitability objectives and targets
- learning organisation principles and practices
- established and refined personal development strategies

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Establishes among team members a strong commitment to goals, strategies, outcomes and priorities.
- Monitors and introduces best practice and benchmarking to improve team plans and performance.
- Works effectively with other team members who have diverse work styles, aspirations, cultures and perspectives.
- Provides leadership to the team in achievement of team plans and goals and in the achievement of individual performance.
- Communicates clearly and concisely with individuals and teams.
- Makes decisions with responsibility and authority.
- Uses effective consultative processes.
- Deals with conflict before it adversely affects team performance.
- Encourages others in the team to openly propose, discuss and resolve issues.
- Analyses problems and barriers to team participation and develops appropriate strategies for their resolution.
- Supports team members to develop skills through teamwork.
- Participates in internal and external environments to successfully influence decisions affecting the team.
- Provides clear direction regarding the devolution of responsibility and accountability.
- Provides constructive feedback to team members to improve performance.
- Promotes networking between teams for mutual benefit.
- Uses continuous improvement processes to enhance equality of team performance.
- Strives to reach consensus on team decisions.
- Recognises and minimises the language, literary and numeracy barriers in team participation.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC022 Influencing
KC027 Problem Solving Processes
KC038 Feedback Mechanisms
SC039 Networking Skills
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC066 Operational Environment: Customer Base, Company Products and Services
SC070 Mentoring Skills
SC071 Leadership Skills
SC072 Planning
SC075 Contingency Planning
KC081 Best Practice and Benchmarking Techniques
KC082 Recognition and Reward Strategies
SC085 Goal Setting Skills
SC094 Motivational Skills
SC095 Assessment Skills
SC096 Facilitation Skills
SC097 Delegation Skills
KC103 Continuous Improvement Techniques and Processes
SC109 Team Building Skills

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**2**
2 Communicating Ideas and Information	**2**
3 Planning and Organising Activities	**3**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**1**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC231A - Manage the operations of a call centre work team to achieved planned outcomes**

Team leaders are actively engaged in implementing, monitoring and recording resource usage to achieve the enterprise business plans. This pivotal role is carried out to create efficient and effective service to customer satisfaction within the enterprise's productivity and profitability plans.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1405A of the Frontline Management competency *'Manage operations to achieve planned outcomes.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Plan resource use to achieve profit/productivity targets	1 Resource information for use in operational plans is collected, analysed and organised in consultation with team members and specialist resource managers. 2 Operational plans contribute to the achievement of enterprise performance/business plan. 3 Operational plans identify available resources taking into account customer needs and the organisation's plans. 4 Contingency plans are prepared in the event of a need to vary initial plans.
2 Acquire resources to achieve operational plan	1 Employees are recruited and inducted within the enterprise human resource management policies and procedures. 2 Physical resources are acquired in accordance with organisational practices and procedures.
3 Monitor operational performance	1 Performance systems and processes are monitored to assess progress in achieving profit/productivity plans and targets. 2 Budget and financial information is analysed and interpreted to monitor profit/productivity performance. 3 Unsatisfactory performance is identified and prompt action is taken to rectify the situation. 4 Recommendations for variation to operational plans are negotiated and approved by the enterprise designated group/person. 5 Unplanned absences are managed to minimise impact on the business.

4 Monitor resource usage	1 Systems and processes are monitored to establish whether resources are being used as planned. 2 Problems with resource usage are investigated and promptly rectified and/or reported to management. 3 Mentoring and coaching is provided to assist team members who have difficulty in using resources within quality, cost and time standards. 4 Utilisation of physical resources is monitored to ensure they are being used as planned. 5 Waste management methods are used effectively in recycling, waste reduction and waste disposal within enterprise and legislative requirements. 6 Systems, procedure and records associated with documenting resource acquisition and usage are managed in accordance with enterprise requirements.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:
- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Team leader involvement in planning and use of resources typically involves reference to:
- customer needs
- strategic goals of the organisation
- productivity and profitability plans
- quality and continuous improvement processes
- workplace industrial agreements
- established systems and procedures
- competencies of the workforce
- best practice and benchmarking relevant to the industry
- legislation, codes and practices
- environmental standards
- ethical practices
- defined resource parameters
- technical standards established by the industry/enterprise
- business and performance plans

Customers may be internal or external to the organisation.

Action plans are enterprise specific but are based on the principles for development of such plans.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Systems used for performance measurement may be:
- electronic, paper, observation

Products and services vary widely form enterprise to enterprise and industry to industry but can encompass:
- new sales, product information, service delivery inquiry, service transaction, billing inquiry, product/service fault, product/service complaint, telemarketing

Rostering arrangements vary from enterprise to enterprise and are based on agreed staffing ratios and may be subject to award or industrial agreement.

Resources typically include:
- people, finance, equipment, power/energy, buildings/facilities, technology, information, time

Records/reports may be:
- oral, written, computer based

Technology used is generally telecommunications and information based. Operating platform may vary but is generally Windows based.

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements
- Trade Practices Act
- Environmental Legislation

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met.

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Interprets and analyses organisation business plans.
- Identifies resources to meet customer needs.
- Identifies resource requirements to achieve team goals.
- Maintains a financial focus in achievement of team goals.
- Manages resources in accordance with specified accountabilities.
- Ensures that legislative and organisational requirements are observed in resource utilisation.
- Encourages best practice use of resources.
- Involves team members in planning and using resources effectively and efficiently.
- Participates in the selection and recruitment of team members.
- Use the appropriate technology to plan and manage resources.
- Monitors and introduces best practice and benchmarking to improve resource utilisation.
- Develops innovative approaches within enterprise policies and practices to improve effectiveness and efficiency in the use of finite resources.
- Implements strategies to eliminate/minimise resource inefficiencies and wastage.
- Provides learning support and encouragement to team members who have difficulty in using resources to agreed standards.
- Records/reports resource utilisation data accurately and on time.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No.	*Item*
SC003	Advanced Oral and Written Communication Skills
SC006	Advanced Customer Service Skills
SC018	Negotiation Skills
SC019	Consultative Skills
KC027	Problem Solving Processes
KC038	Feedback Mechanisms
SC039	Networking Skills
SC042	Conflict Resolution
KC047	Basic Finance (Costing, Profit and Loss)
KC048	Basic Cost Benefit Analysis
KC051	Enterprise Culture and Values
KC052	Enterprise Mission, Business Goals and Standards
KC066	Operational Environment: Customer Base, Company Products and Services
KC069	Operational Systems and Technology
SC070	Mentoring Skills
SC071	Leadership Skills
SC073	Action Planning
SC074	Resource Planning
SC075	Contingency Planning
SC078	Resource Management Skills
KC081	Best Practice and Benchmarking Techniques
SC085	Goal Setting Skills
KC088	Customer Needs and Demands
KC089	Legislative Restrictions
KC090	Workplace Agreements
SC091	Recruitment and Selection
KC092	Induction Programs
KC103	Continuous Improvement Techniques and Processes
SC106	Performance Monitoring Practices

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC232A - Manage information and information systems in the call centre team environment**

The team leader has a key role in the use and management of information and information systems and the involvement in team members in that activity

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1406A of the Frontline Management competency *' Manage workplace information.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Identify and source information needs	1 The information needs of individuals /teams are determined and the sources identified. 2 Information held by the enterprise is reviewed to determine suitability and accessibility. 3 Plans are prepared to obtain information that is not available/accessible within the organisation.
2 Collect, analyse and report information	1 Collection of information is timely and relevant to the individuals/team. 2 Information is in a format suitable for analysis, interpretation and dissemination. 3 Information is analysed to identify and report relevant trends and developments in terms of the needs for which it is acquired.
3 Use management information systems	1 Systems and technology are used to monitor progress in achieving product/service targets and standards. 2 Technology available in the work area/enterprise is used to manage information efficiently and effectively. 3 Recommendations for improving the information system are submitted to the designated enterprise person/area.
4 Prepare business plans and budgets	1 Team members are involved in business plan/budget preparation in a way that uses their contribution effectively and gains their support for the outcomes. 2 Team business plans/budgets are prepared and presented in accordance with enterprise guidelines as required. 3 Contingency plans are prepared in the event that alternative action is required.

5 Prepare resource proposals	1 Resource planning data is collected in consultation with team members, management and resource planning specialists. 2 Estimates of resource needs and utilisation reflect enterprise business plans and customer requirements. 3 Proposals to secure resources are supported by clearly presented submissions describing realistic options, benefits, costs and outcomes.

RANGE OF VARIABLES

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- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Information may be stored electronically or physically and may include libraries, filing/records systems, personal storage systems, electronic data bases.

Resources typically include:
- people, finance, equipment, power/energy, buildings/facilities, technology, information, time

Records/reports may be:
- oral, written, computer based

Technology used is generally telecommunications and information based. Operating platform may vary but is generally Windows based.

Management of information typically involves reference to:
- customer needs
- strategic goals of the enterprise
- enterprise policies, guidelines and processes
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- productivity and profitability objectives and targets
- established systems and procedures
- competencies of the workforce
- best practice and benchmarking relevant to the industry
- legislation, codes and practice
- resource parameters, whether defined or negotiated
- productivity and profitability targets
- technical standards established by industry/enterprise
- business and performance plans

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Manages work effectively to achieve goals and results.
- Acquires and uses information appropriate to responsibility.
- Makes decisions within responsibility and authority.
- Organises and uses resources to achieve business plans.
- Provides input to enterprise business planning processes.
- Eliminates/minimises resource inefficiencies and waste.
- Develops alternative approaches to improve resource usage.
- Ensures that legislative requirements are met in the workplace.
- Prepares and negotiates recommendations to improve resources/resource usage.
- Uses effective consultative approaches.
- Uses management information systems effectively.
- Selects and uses available technology appropriate to the task.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC018 Negotiation Skills
SC019 Consultative Skills
SC022 Influencing
KC027 Problem Solving Processes
SC032 Budgeting Skills
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC061 Enterprise Planning Processes
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
SC071 Leadership Skills
SC074 Resource Planning
SC075 Contingency Planning
SC076 Financial Planning
SC078 Resource Management Skills
KC081 Best Practice And Benchmarking Techniques
KC083 Information Systems and Usage
SC085 Goal Setting Skills
KC103 Continuous Improvement Techniques and Processes
SC106 Performance Monitoring Practices

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**3**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC233A - Lead a Call Centre team delivering quality customer service**

The team leader is involved in ensuring that products and services are delivered and maintained to standards agreed by the enterprise and the customer. This is carried out in the context of the organisation's policies and practices as well as legislation, conventions and codes of practice.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1407A of the Frontline Management competency *' Manage quality customer service.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Plan to meet internal and external customer requirements	1 Needs of customers are researched, understood and assessed and included in the planning process. 2 Provision is made in plans to achieve quality, time and cost specifications agreed with the customer.
2 Ensure delivery of quality products and services	1 Products and services are delivered to customer specification within quality, time, cost and resource parameters. 2 Team and individual performances consistently meet quality, safety, resource and delivery standards. 3 Coaching, mentoring assists team members overcome difficulty in meeting customer service standards.
3 Monitor, adjust and report customer service	1 Systems and technology are used to monitor progress in achieving product/service targets and standards. 2 Customer feedback is sought and used to improve provision product and service delivery. 3 Resources are used effectively and efficiently to provide quality products/services to the customer. 4 Decisions to overcome problems with product/service are taken in consultation with enterprise designated person/group. 5 Adjustments are made to product/service and those who have a role in their planning and delivery are informed of changes. 6 Records, reports and recommendations are managed within enterprise systems and processes.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:
- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Customers may be internal or external to the organisation.

Action plans are enterprise specific but are based on the principles for development of such plans.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Measures may include:
- team goals, productivity data, resource usage, customer satisfaction

Systems used for performance measurement may be:
- electronic, paper, observation

Products and services vary widely from enterprise to enterprise and industry to industry but can encompass:
- new sales, product information, service delivery inquiry, service transaction, billing inquiry, product/service fault, product/service complaint, telemarketing

Rostering arrangements vary from enterprise to enterprise and are based on agreed staffing ratios and may be subject to award or industrial agreement

Resources typically include:
- people, finance, equipment, power/energy, buildings/facilities, technology, information, time

Records/reports may be:
- oral, written, computer based

Technology used is generally telecommunications and information based. Operating platform may vary but is generally Windows based

The delivery and maintenance of products and services typically involves reference to:

- customer needs
- strategic goals of the enterprise
- enterprise policies, guidelines and processes
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- productivity and profitability objectives and targets
- established systems and procedures
- competencies of the workforce
- best practice and benchmarking relevant to the industry
- legislation, codes and practice
- access equity and principles
- ethical practices
- resource parameters, whether defined or negotiated
- productivity and profitability targets
- technical standards established by industry/enterprise
- business and performance plans

Relevant legislation, codes, regulations and standards include:

- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Satisfies customer needs for products and services within time, quality and cost parameters.
- Develops, monitors and achieves key performance indicators.
- Uses continuous improvement processes to enhance quality of team performance.
- Monitors best practice and benchmarking to improve service delivery.
- Measures the quality of performance against enterprise criteria.
- Uses effective consultative processes with team members to achieve planned outcomes.
- Communicates plans clearly and concisely to management.
- Maintains effective communication links with customers, staff and management.
- Achieves action and performance plans.
- Promotes, encourages and actively assists the team in achievement of outcomes.
- Provides learning support to team members who have difficulty in undertaking their role in delivering and maintaining products and service.
- Manages finite resources effectively and efficiently to achieve planned outcomes.
- Records information and reports within established accountability guidelines.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
SC018 Negotiation Skills
SC019 Consultative Skills
SC022 Influencing
KC027 Problem Solving Processes
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC065 Read And Interpret Legislation, Codes Of Practice and Enterprise Policy
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
SC070 Mentoring Skills
SC071 Leadership Skills
SC073 Action Planning
SC075 Contingency Planning
SC078 Resource Management Skills
KC081 Best Practice and Benchmarking Techniques
SC085 Goal Setting Skills
KC099 Relevant Awards and Industrial Agreements
KC103 Continuous Improvement Techniques and Processes
SC106 Performance Monitoring Practices
SC109 Team Building Skills

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC234A - Develop and maintain a safe workplace and environment**

The team leader has a key role in ensuring that the workplace meets safety requirements set down in legislation, codes of practice, industrial workplace agreements and within the industry's/enterprise's policies and practices.

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1308A of the Frontline Management competency *'Develop and maintain a safe workplace and environment.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Access and share legislation, codes and enterprise policy	1 Legislation, standards and organisational policies and practices relevant to the creation and maintenance of a safe workplace and environment are made available to team members. 2 Arrangements are made to provide information in language style and format which is understood by all team members. 3 Team members know their legal responsibility for maintaining a safe workplace and environment. 4 Implications of an unsafe or discriminatory work environment are understood by all team members.
2 Plan and implement safety requirements	1 Work practices are planned with team members to ensure compliance with workplace and environmental legislation and standards. 2 Work practices are implemented in accordance with requirements specified in legislation and standards for safe workplaces and environments. 3 Coaching, mentoring supports team members in managing their rights and responsibilities.
3 Monitor, adjust and report safety performance	1 Potential and actual problems are identified, rectified and reported promptly and decisively to ensure workplace and environmental safety. 2 Hazards are managed so that their presence is minimised. 3 Waste recycling, reduction and disposal is carried out within legislative and enterprise requirements.

	4 Recommendations to make improvements to comply with legislation and standards are submitted to management. 5 Team members are informed of the results of improvements in the workplace. 6 Systems, records and reporting procedures are maintained as required by legislation and organisational policy.
4 Investigate and report non-conformance	1 Accidents and incidents are investigated and dealt with in accordance with enterprise policy. 2 Coaching and mentoring support is provided to ensure team members develop competencies to prevent recurrence of accidents and incidents. 3 Workplace practices are implemented to ensure that non conformance is not repeated.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.
Call centres exist across a range of industries and industry sectors. Examples include:

- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Organisational culture and values are unique to the enterprise.
Performance standards and measures relating to safe and non discriminatory work practices are enshrined in legislation and covered by awards, workplace agreements and enterprise policy.

Systems used for performance measurement may be:

- electronic, paper, observation

Reporting mechanisms and procedure can be dictated by legislation and enterprise policy.
The team leader's role and responsibility will vary significantly from enterprise to enterprise and will be influenced by:

- workplace environment
- enterprise policies, guidelines and processes
- workplace industrial agreements
- workplace systems and procedures
- established consultative practices
- legislation and codes of practice
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- best practice and benchmarking relevant to the industry/enterprise
- resource parameters

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements
- Freedom of Information
- Environmental Legislation (State and Federal)

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met.

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Develops and promotes a safety conscious culture within the workplace.
- Applies legislation and codes of practice in own work.
- Provides a model to others in working safely and managing stress.
- Explains safety legislation, standards, procedures and guidelines.
- Takes prompt action to rectify/report non compliance.
- Prepares and negotiates recommendations to improve safety.
- Monitors and introduces best practice to improve the work environment.
- Uses appropriate technology to assist/monitor the work environment.
- Communicates clearly and concisely information to team members and obtains feedback on team member understanding.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC002 Oral and Written Communication Skills
KC027 Problem Solving Processes
KC038 Feedback Mechanisms
SC042 Conflict Resolution
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
SC070 Mentoring Skills
SC071 Leadership Skills
SC072 Planning
SC075 Contingency Planning
KC081 Best Practice and Benchmarking Techniques
SC093 Counselling Skills
KC100 Reporting Mechanisms
KC101 Policy Relating to Counselling, Rehabilitation Requirements
KC103 Continuous Improvement Techniques and Processes
SC104 Consultation Skills
SC105 Investigative Skills
KC113 Management of Workplace Ergonomics
KC114 Identification and Management of Workplace Stress

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**3**
4 Working With Others and in Teams	**3**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC235A - Implement and monitor quality and continuous improvement systems and processes**

A team leader has an active role in managing the continuous improvement process and in achieving the enterprise's quality objectives

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1409A of the Frontline Management competency *'Implement and monitor continuous improvement systems and processes.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Implement continuous improvement systems and processes	1 Team members are actively encouraged and supported to participate in decision making processes and to assume responsibility and authority. 2 Enterprise continuous improvement processes are communicated to team members. 3 Problems and issues are analysed and resolved appropriately, promptly and decisively. 4 Personal commitment to and participation in a wide variety of continuous improvement activities are achieved. 5 Mentoring and coaching are provided to assist team members implement quality and continuous improvement processes.
2 Monitor, adjust and report performance	1 Systems and technology are used to monitor progress and to identify ways in which planning and operations can be improved. 2 Customer service is strengthened through the use of continuous improvement techniques and processes. 3 Plans are adjusted and communicated to those who have a role in their development and implementation.
3 Consolidate opportunities for further improvement	1 Team members are informed of savings and productivity improvements resulting from quality systems. 2 Work performance is documented and the information is used to identify opportunities for further improvement. 3 Records, reports and recommendations for improvement are managed within enterprise systems and processes.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:
- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
- Computer software and hardware companies–product sales and information, product and customer support.
- Banking sector–marketing services, customer funds transfer, loan applications, customer service.
- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Customers may be internal or external to the organisation.

Action plans are enterprise specific but are based on the principles for development of such plans.

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Measures may include:
- team goals, productivity data, resource usage, customer satisfaction

Systems used for performance measurement may be:
- electronic, paper, observation

Products and services vary widely from enterprise to enterprise and industry to industry but can encompass:
- new sales, product information, service delivery inquiry, service transaction, billing inquiry, product/service fault, product/service complaint, telemarketing

Resources typically include:
- people, finance, equipment, power/energy, buildings/facilities, technology, information, time

Records/reports may be:
- oral, written, computer based

Technology used is generally telecommunications and information based. Operating platform may vary but is generally Windows based.

Quality and continuous improvement can apply to:
- variation, customer service, performance, process, productivity, financial, goal setting, resource management

Team leader role in relation to quality and continuous improvement is influenced by the following :
- operational environment
- customer demands
- enterprise policies, guidelines and processes
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- workplace industrial agreements
- legislation, codes and practice
- ethical standards established by the enterprise
- established systems and procedures
- competencies of the workforce
- best practice and benchmarking relevant to the industry
- learning environment

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Monitors and introduces best practice and benchmarking to improve quality and continuous improvement processes.
- Uses management systems to contribute to the team's operations including financial, human resource, physical resource, information and technology.
- Gain the commitment of the team members to quality and continuous improvement principles and practices.
- Encourages ideas and feedback from team members in developing and refining processes.
- Implements processes for prompt resolution of processes.
- Uses technology to monitor and review of performance.
- Applies effective problem identification and problem solving techniques.
- Initiates continuous improvement processes to improve quality of individual and team performance.
- Maintains a focus on quality performance in achieving outcomes acceptable to customers.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
KC027 Problem Solving Processes
SC028 Problem Solving Skills
KC038 Feedback Mechanisms
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
SC070 Mentoring Skills
SC071 Leadership Skills
SC073 Action Planning
SC074 Resource Planning
SC075 Contingency Planning
KC081 Best Practice and Benchmarking Techniques
SC098 Delegation and Empowerment
KC103 Continuous Improvement Techniques and Processes
SC106 Performance Monitoring Practices

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC236A - Facilitate and capitalise on change and innovation**

Team leaders have an active role in fostering change in team members and acting as a catalyst in the implementation of change and innovation. Their position at the 'customer' end of the enterprise places them strategically to suggest change and innovation. They have a creative role in ensuring that both the enterprise and the customer benefit from change through improved products and service.

Prerequisite Units
Assumes core competency units

Equivalents Units
This unit is based on unit BSXFM1410A of the Frontline Management competency *'Facilitate and capitalise on change and innovation.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Participate in planning the introduction of change	1 Contribute effectively in the enterprise planning processes to introduce change. 2 Plans to introduce change are made in consultation with team members. 3 Enterprise objectives and plans to introduce change are explained clearly to team members.
2 Develop creative and flexible approaches and solutions	1 Alternative approaches to dealing with issues, problems, processes are identified and analysed within enterprise goals, strategies and plans. 2 Team members are encouraged to contribute ideas for improvement and change. 3 Risks are assessed and action is then initiated to achieve a recognised benefit or advantage. 4 Creative and responsive approaches to resource management improves productivity and/or reduces costs in a competitive environment.
3 Manage emerging challenges and opportunities	1 Team members respond effectively and efficiently to changes in enterprise goals, plans and priorities. 2 Coaching and mentoring is used to assist team members in developing new or varied competencies to handle change effectively and efficiently. 3 Opportunities are taken within responsibility and authority to make adjustments to respond to the changing needs of customers and the enterprise. 4 Team members are kept informed of progress in the implementation of change.

RANGE OF VARIABLES

A **Call Centre** is an organisational unit that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes.

Call centres exist across a range of industries and industry sectors. Examples include:
- Telecommunications companies–product sales and marketing, customer service and account inquiries, directory services, call assistance.
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- Insurance companies–customer service, product sales, new policy applications, renewals.
- Retailers and suppliers–marketing services and product, after sales support, dealer care, product sales and delivery.
- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

Customers may be internal or external to the organisation.

Nature of change can vary from minor (process change) to major (organisation/technology change). Team leaders role/input to change would vary accordingly and could involve:
- initiation, influence, implementation

Performance standards and measures are enterprise specific and vary according to the particular industry sector.

Products and services vary widely from enterprise to enterprise and industry to industry but can encompass:
- new sales, product information, service delivery inquiry, service transaction, billing inquiry, product/service fault, product/service complaint, telemarketing

Resources typically include:
- people, finance, equipment, power/energy, buildings/facilities, technology, information, time

Team leader role in relation to innovation and change is influenced by the following:
- operational environment
- enterprise policies, guidelines and processes
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- workplace industrial agreements
- legislation, codes and practice
- ethical standards established by the enterprise
- product and service range
- best practice and benchmarking relevant to the industry
- learning environment

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and anti discrimination legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements
- Trade Practices Act

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.

- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
- Specific requirements for competency against a particular context, as defined in the range of variables, may vary between enterprises and for the particular learning strategy adopted.
- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance

- Maintains knowledge of current and potential developments within the organisation and industry.
- Monitors best practice and benchmarking to improve capability of team to benefit from change.
- Responds to unusual or changing situations with actions appropriate to achieving individual and team goals.
- Draw on skills and knowledge to assist the organisation to capitalise on change.
- Adapts behaviour to the needs of the situation to achieve planned outputs and outcomes.
- Establishes realistic goals and change management processes for self and team.
- Identifies opportunities to initiate and add value regularly.
- Monitors developments to keep self and team at 'cutting edge'.
- Develops personal approach to handling change situations.
- Supports team members in development of skills to handle change.
- Responds promptly to new situations by identifying critical information and issues and developing appropriate strategies.
- Uses continuous improvement processes to enhance the quality of individual and team performance.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC006 Advanced Customer Service Skills
KC027 Problem Solving Processes
SC028 Problem Solving Skills
KC038 Feedback Mechanisms
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC066 Operational Environment: Customer Base, Company Products and Services
KC069 Operational Systems and Technology
SC070 Mentoring Skills
SC071 Leadership Skills
SC074 Resource Planning
SC075 Contingency Planning
SC079 Change Management Skills
SC080 Self Management Skills
KC081 Best Practice and Benchmarking Techniques
SC085 Goal Setting Skills
SC098 Delegation and Empowerment
KC103 Continuous Improvement Techniques and Processes
SC106 Performance Monitoring Practices

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**2**
4 Working With Others and in Teams	**2**
5 Using Mathematical Ideas and Techniques	**2**
6 Solving Problems	**2**
7 Using Technology	**2**

STREAM Call Centres

FIELD Leadership

UNIT **ICTTC237A - Contribute to the development of a learning culture in the call centre team environment**

Team leader plays a prominent role in encouraging and supporting the development of team members. The link between performance planning and learning is a key relationship in developing active continuous improvement process

Prerequisite Units
Assumes core competency units

Equivalent Units
This unit is based on unit BSXFM1411A of the Frontline Management competency *'Contribute to the development of a workplace learning environment.'* Demonstration of competency against the FMI unit would receive full recognition against this unit.

ELEMENT	PERFORMANCE CRITERIA
1 Create learning opportunities	1 Workplace environments that facilitate learning are developed and supported. 2 Training needs are identified and analysed in relation to individual, team and enterprise requirements. 3 Learning plans are developed as an integral part of team and individual performance. 4 Learning plans reflect the diversity of needs and learning opportunities. 5 Resources needed for training are identified and organised so that they are available when required. 6 Contingency plans are developed to manage learning activities in situations in which resources are limited.
2 Assess workplace competence	1 Plans are prepared to assess workplace competence. 2 Assessment instruments are developed to assess team member performance. 3 Assessment is conducted according to agreed procedures and processes. 4 Feedback is provided to individuals being assessed to ensure that they are fully informed of outcomes and subsequent action should they be deemed not yet competent. 5 Individual is supported in the event of appeal against the assessment.

3	Facilitate and promote learning	1 Workplace activities are used as opportunities for learning. 2 Coaching and mentoring contributes effectively to development of workplace knowledge, skills and attitudes. 3 Benefits of learning are shared with others in the team. 4 Workplace achievement is recognised by timely and appropriate recognition, feedback and reward.
4	Monitor and improve learning effectiveness	1 Performance of team members is monitored to determine the type and extent of additional work based support. 2 Feedback from team members is used to identify and introduce improvements in future learning arrangements. 3 Adjustments negotiated with training development specialists results in improvements in the efficiency and effectiveness of learning. 4 Records and reports of competency are documented and maintained within the enterprise systems and procedures.

RANGE OF VARIABLES

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- Travel industry–reservations, information, customer support, loyalty programs.
- Market research companies.
- Charity organisations–financial support and product sales.
- Mercantile agencies.
- Credit reporting bureaus.
- Government organisations–government service inquiries, government benefit issues.

The role of the team leader in a learning environment will be influenced by:
- enterprise policies, guidelines and processes
- level of autonomy
- enterprise quality and continuous improvement processes and standards
- business and performance plans
- ethical standards established by the enterprise
- learning organisation principles and practices
- defined resource parameters

A range of learning strategies may be accessed including:
mentoring, coaching exchange rotation, action learning, structured training programs

Development and learning may be undertaken both on and off the job and internal or external to the enterprise

A team leader in a learning environment creatively uses and promotes:
- individual and team competence
- a range of development strategies to suit learning needs
- workplace industrial agreements
- best practice and benchmarking principles and practices
- legislation, codes and practices
- traditional and non traditional opportunities for both individual and team learning
- quality and continuous improvement processes
- business and performance plans
- technical standards established by the enterprise
- recognition of prior learning and recognition of current competency principles

Relevant legislation, codes, regulations and standards include:
- Privacy Act
- EEO and Anti Discrimination Legislation
- Telecommunications Act
- Occupational Health and Safety Legislation
- Industrial Awards and Agreements

EVIDENCE GUIDE

Assessment Location
A call centre or simulated call centre environment

Assessment Resources
Telecommunications equipment to enable the performance criteria to be met

Evidence of Competency
Candidates will provide evidence of their performance and their underpinning skills and knowledge.
- Evidence of competency is best obtained by observing activities in an operational environment under normal working conditions. If this is not practicable, observations in a realistic simulated environment may be substituted.
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- Skills and knowledge evidence may be completion of training courses or on-the-job learning.

Performance
- Provides leadership and support to the team and organisation to create and sustain a flexible learning environment.
- Supports and encourages learning by team members.
- Monitors and introduces best practice and benchmarking to improve the learning environment.
- Undertakes assessment and develops training plans for team members and team.
- Promotes organisational learning to individuals and the team.
- Promotes the achievement of competency by team members.
- Supports, coaches, mentors staff in the achievement of their individual learning plans.
- Provides/or arranges support for those with learning difficulties.
- Promotes collaborative processes in developing a learning environment.
- Recognises the significant achievement of team and team members.
- Creates opportunities to celebrate success.
- Uses continuous improvement processes to enhance the quality of individual and team performance.
- Assesses competency of individual consistent with recognised industry assessment standard.
- Uses management information systems to record achievement of competency.

Skills and Knowledge

Details of Skills and Knowledge listed for this unit are specified in the "Telecommunication Training Package - Skills and Knowledge" booklet by the code indicated.

No. *Item*

SC003 Advanced Oral and Written Communication Skills
SC019 Consultative Skills
SC022 Influencing
KC038 Feedback Mechanisms
KC050 Enterprise Policies, Procedures and Guidelines
KC051 Enterprise Culture and Values
KC052 Enterprise Mission, Business Goals and Standards
KC062 Enterprise Training Policy
KC066 Operational Environment: Customer Base, Company Products and Services
SC070 Mentoring Skills
SC071 Leadership Skills
SC072 Planning
SC075 Contingency Planning
SC077 Career Planning
KC081 Best Practice and Benchmarking Techniques
SC094 Motivational Skills
SC095 Assessment Skills
SC096 Facilitation Skills
KC103 Continuous Improvement Techniques and Processes
SC107 Learning Strategies
SC109 Performance Monitoring Practices

KEY COMPETENCY	LEVEL
1 Collecting, Analysing and Organising Information	**3**
2 Communicating Ideas and Information	**3**
3 Planning and Organising Activities	**3**
4 Working With Others and in Teams	**3**
5 Using Mathematical Ideas and Techniques	**1**
6 Solving Problems	**2**
7 Using Technology	**1**