

<b>Title</b>	<b>Locate, organise, and utilise information to meet customer requirements in a contact centre</b>		
<b>Level</b>	<b>3</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	<p>This unit standard is for people who work with information that is required on a regular basis in a contact centre.</p> <p>People credited with this unit standard are able to:</p> <ul style="list-style-type: none"> <li>- locate and organise information to meet a range of customer requirements in a contact centre; and</li> <li>- utilise information to meet customer requirements in a contact centre.</li> </ul>
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<b>Classification</b>	Contact Centres > Contact Centre Operations
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 Assessment against this unit standard must be based on evidence from a real or simulated workplace situation, provided the simulation reflects industry requirements and requires performance that replicates a real working environment. Assessment should only occur following a period of practical experience.
- 2 References  
Companies Act 1993;  
Consumer Guarantees Act 1993;  
Credit Contracts and Consumer Finance Act 2003;  
Fair Trading Act 1986;  
Financial Transactions Reporting Act 1996;  
Health and Safety at Work Act 2015;  
Human Rights Act 1993;  
ISO 18295-1:2017 Customer contact centres – Part 1: Requirements for customer contact centres;  
ISO 18295-2:2017 Customer contact centres – Part 2: Requirements for clients using the services of customer contact centres;  
Privacy Act 1993;  
Public Records Act 2005;  
Securities Regulations 2009;  
and all subsequent amendments and replacements.

### 3 Definitions

*Contact centre* – an organisational unit of any size that acts as a focal point for communication between organisations and customers using live voice telephony and/or information technology to meet service purposes. Contact centres may also be referred to as call centres. Contact centres exist across a wide range of industries, for example banking, insurance, telecommunications, computer companies, retailers and suppliers of services, local government, government agencies, travel industry, market research companies, and charity organisations.

*Contact centre policies and procedures* – refer to those policies, procedures, and/or guidelines of a real workplace, or in the case of assessment being undertaken in a simulated workplace environment they are those of a real workplace that reflect the policies and procedures of the workplace rather than those of the training provider.

*CRM* – Customer Relationship Management System.

*Customer* – a user, customer, or receiver of a service or product and may be internal or external to the contact centre and may include colleagues.

*Interactions* – refer to communicating with contact centre stakeholders across all current and different types of media. Examples may include but are not limited to: phone calls, letters, emails, webchat, video calling, blogs, and other social media.

- 4 Information may be stored on computer systems and/or in manual record systems.
- 5 Assessment must be against four different customers or a customer who may have multiple needs within one interaction.
- 6 All activities and evidence presented for outcomes and performance criteria in this unit standard must be in accordance with contact centre policies and procedures.

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## Outcomes and performance criteria

### Outcome 1

Locate and organise information to meet a range of customer requirements in a contact centre.

Range may include but is not limited to – terms and conditions, contact details, email folders, frequently used information, website favourites, knowledge base, CRM systems.

### Performance criteria

- 1.1 Ensure information required to meet customer requirements is complete, current, accurate, and easily accessible.
- 1.2 Collate and categorise information.
- 1.3 File or dispose of information.

### Outcome 2

Utilise information to meet customer requirements in a contact centre.

**Performance criteria**

- 2.1 Utilise information to meet customer requirements using relevant methods and resources.

Range may include but is not limited to – emails, mail, phone calls, databases, suppliers, internet or intranet research, computer networks, manuals, national and international standards, media, bulletin boards, training courses, personal knowledge; evidence of four different methods and resources is required.

**This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.**

**Status information and last date for assessment for superseded versions**

Process	Version	Date	Last Date for Assessment
Registration	1	25 July 1999	31 December 2011
Review	2	25 February 2000	31 December 2011
Revision	3	3 April 2001	31 December 2011
Review	4	26 July 2005	31 December 2012
Review	5	9 December 2010	31 December 2017
Review	6	17 April 2014	31 December 2021
Review	7	27 September 2018	31 December 2026
Review	8	30 May 2024	31 December 2026

**Consent and Moderation Requirements (CMR) reference**

0003

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.