

Title	Communicate with contact centre customers and resolve enquiries		
Level	3	Credits	15

Purpose	<p>This unit standard is for contact centre customer service agents (CSAs) to resolve business as usual, and complex customer enquiries.</p> <p>People credited with this unit standard are able to, consistent with contact centre procedures and policies: communicate and resolve business as usual and complex customer enquiries; demonstrate and apply knowledge of communicating with challenging customers in a contact centre; and identify and resolve customer complaints in a contact centre.</p>
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Classification	Contact Centres > Contact Centre Operations
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Available grade	Achieved
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Guidance Information

- 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.
- References
Companies Act 1993;
Consumer Guarantees Act 1993;
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;
Securities Regulations 2009;
and all subsequent amendments and replacements.

3 Definitions

Business as usual enquiries – are general enquiries relating to products and/or services that can be resolved at first point of contact.

Challenging customers – examples of challenging customers may include but are not limited to customers who are angry, sad, confused, stressed, not speakers of English as a first language, customers with special needs.

Complex customer enquiries – are enquiries relating to products and/or services that cannot be resolved at first point of contact, usually requiring more than one step or another team member to resolve.

Communication skills – include verbal, non-verbal, written skills to build relationships in a multicultural and diverse context.

Communication techniques – are varied techniques which may include but is not limited to open and closed questions, clarifying, reflecting, paraphrasing, summarising,

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.

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.

CSA – 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 Range

a All activities and evidence presented for outcomes and performance criteria in this unit standard must be in accordance with contact centre policies and procedures.

b For the purposes of this unit standard, a complex customer enquiry does not include resolving an escalated enquiry.

Outcomes and performance criteria

Outcome 1

Communicate and resolve business as usual and complex customer enquiries.

Range evidence of two business as usual enquiries and two complex customer enquiries is required.

Performance criteria

1.1 Greet customer.

Range greeting requirements may include but are not limited to – standard welcome message, standard response to interaction, tone and modulation, courtesy, timeliness, grammar and syntax; evidence of three is required for each enquiry.

1.2 Establish customer identity and apply security processes to verify customer identity where necessary.

1.3 Establish rapport with customer and utilise problem solving techniques to identify needs and/or requirements.

Range establishing rapport may include but is not limited to – varied communication techniques, using customer name, displaying empathy; examples of customer needs may include but are not limited to – standard enquiries, problem solving, enquiries outside the usual range of goods and/or service provision, multiple but linked needs, issue recognition; evidence of three is required for each enquiry.

1.4 Use existing product, service and/or industry knowledge or systems to identify potential solution(s) with the best interest(s) of the customer and business in mind.

1.5 Explain proposed solution(s) to the customer in plain language and receive confirmation of understanding.

Range options may include but are not limited to – presentation of information, solutions, goods and services, products; explanation may include but is not limited to – advantages and disadvantages of the options, customer education.

1.6 Action customer needs outside CSA's immediate responsibility or authority.

Range may include but is not limited to – referral to other services, referral to supervisor, explain the enquiry, advise customer of timeframes and next steps.

1.7 Record interaction information accurately.

Range may include but is not limited to – date, nature of enquiry, action taken, follow-up details.

1.8 Close customer interaction and initiate follow-up actions.

Range closing may include but is not limited to – confirmation of agreement made, use of customer's name, invitation to use goods and/or services again, thanks for patronage, next course of action, summarising interaction, farewell statement, provision of timeframes;
evidence of three is required for each enquiry.

Outcome 2

Demonstrate and apply knowledge of communicating with challenging customers in a contact centre.

Performance criteria

2.1 Explain when and how you would escalate and de-escalate an enquiry.

2.2 Explain steps to respond to challenging customer enquiries.

Range steps may include but is not limited to – identifying the emotion of the customer, asking open questions to clarify the issue, enquiring whether a translator is needed;
evidence of three different types of challenging customers is required.

2.3 Communicate with challenging customers to clarify the enquiry and ensure their requirements are identified.

Range evidence of three types of challenging customers is required.

2.4 Apply customer service techniques and communication skills to address the emotional needs of challenging customers.

Range evidence of three types of challenging customers is required.

Outcome 3

Identify and resolve customer complaints in a contact centre.

Range evidence of resolving two customer complaints is required.

Performance criteria

- 3.1 Identify complaint and determine possible resolution(s) for the complaint in accordance with constraints.
- Range options for resolution will depend on the nature of the company, the products or services, and the nature of the complaint. Options may include but are not limited to – referring customer to another organisation, providing information on the proper use of a product or service, arranging replacement or repair of a product, refunding or crediting payment.
- 3.2 Confirm complaint and customer understanding of proposed resolution, and/or escalate complaint to higher authority within the company in accordance with the CSA's scope and authority.
- 3.3 Record details of complaint and its resolution. In the case of escalation, convey details to the person to whom the complaint is referred.
- 3.4 Initiate follow-up actions according to the nature of the resolution of the complaint.
- Range follow-up actions may include but are not limited to – initiating arrangements for repairs, assigning faults to service staff, crediting money, arranging for delivery of replacement product, confirmation or apologies in writing, initiating action to improve organisational processes and performance.

Replacement information	This unit standard replaced unit standard 16776 and unit standard 16784.
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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	17 April 2014	31 December 2021
Review	2	27 September 2018	31 December 2026
Review	3	30 May 2024	31 December 2026

Consent and Moderation Requirements (CMR) reference	0003
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.