

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

Purpose	<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"> – locate and organise information to meet a range of customer requirements in a contact centre; and – utilise information to meet customer requirements in a contact centre.
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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;
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.
- 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.

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.

Planned review date	31 December 2023
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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	N/A

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>.

Comments on this unit standard

Please contact The Skills Organisation reviewcomments@skills.org.nz if you wish to suggest changes to the content of this unit standard.