

Title	Manage complex interactions in a contact centre		
Level	4	Credits	5

Purpose	<p>This unit standard is for senior customer service agents (CSAs) and people in supervisory positions in a contact centre who manage complex interactions to meet the needs of contact centre customers.</p> <p>People credited with this unit standard will be able to:</p> <ul style="list-style-type: none"> – receive and resolve complex interactions in a contact centre; and – build rapport in complex interactions.
----------------	---

Classification	Contact Centres > Contact Centre Management
-----------------------	---

Available grade	Achieved
------------------------	----------

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
 - Code of Banking Practice*; available at <http://www.nzba.org.nz>;
 - Companies Act 1993;
 - Consumer Guarantees Act 1993;
 - Credit Contracts and Consumer Finance Act 2003;
 - Fair Trading Act 1986;
 - Financial Advisers Act 2008;
 - 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 Markets Amendment Act 2006;
 - Securities Regulations 2009;
 - and all subsequent amendments and replacements.

3 Definitions

Complex interaction – an interaction that involves advanced knowledge, skill, decision making and/or additional resources.

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.

CSA – Customer Service Agent. Also known as customer service representatives, customer care consultant, customer service operator or call centre operator.

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.

Escalation – an interaction referred by a team member to a higher authority (a supervisor, team leader or other personnel within the contact centre who has the authority to provide alternative solutions to the customer).

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.

Multifaceted interactions – interactions with two or more components but of the same enquiry.

4 Range

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

b Evidence for Outcomes 1 and 2 may use the same interactions.

Outcomes and performance criteria

Outcome 1

Receive and resolve complex interactions in a contact centre.

Range complex interaction – escalation, advanced technical queries, challenging customers, multifaceted interactions; evidence of three different complex interactions is required.

Performance criteria

1.1 Receive interaction and ensure all necessary information is obtained. Conduct additional research as required.

Range may include but is not limited to – questioning, active listening, paraphrasing, summarising, reflective communication, responding to non-verbal cues, reviewing customer history.

1.2 Identify and communicate the rights and responsibilities of the customer and communicate suitable options.

1.3 Use communication skills appropriate to the interaction.

Range may include but is not limited to – body language, plain English clarity, tone of voice, etiquette.

- 1.4 Explain available options for resolving the complex issue.
- 1.5 Record details of interaction and complete agreed follow-up actions.

Outcome 2

Build rapport in complex customer interactions.

Range evidence of three customer interactions is required.

Performance criteria

2.1 Assure customer that every effort will be made to resolve the issue and manage customer expectation.

2.2 Exercise rapport building techniques.

Range may include but is not limited to – empathy, mirroring, use of customer name, common ground.

2.3 Maintain rapport throughout the interaction. If rapport is lost, implement measures to regain rapport.

Range may include but is not limited to – recap accurately, identify when and why rapport was lost and re-establish, use customer name, build trust by discussing solution.

Planned review date	31 December 2023
----------------------------	------------------

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	N/A

Consent and Moderation Requirements (CMR) reference	0003
--	------

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.co.nz if you wish to suggest changes to the content of this unit standard.