Title	Demonstrate and apply knowledge of contact centre technology and systems

Level	3	Credits	5

Purpose	This unit standard is for customer service agents (CSAs) who need to understand and use the technology and systems in a modern contact centre.
	People credited with this unit standard are able to:
	- explain and utilise current contact centre technology and systems;
	- describe functions that enable and manage the interaction delivery in a contact centre;
	- explain contact centre statistics available to CSAs.

Classification	Contact Centres > Contact Centre Operations

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
Human Rights Act 1993;
Health and Safety at Work Act 2015;
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;
and all subsequent amendments and replacements.

3   Definitions

Abandonment rate – the percentage of interactions where the customer terminates the contact before being answered.

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 interaction volume – the number of interactions per specified period.

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.

Contact centre technology and systems – refer to current technology and systems utilised in a contact centre. For example, email management, telephony, call distribution and queuing, headset, computer, adapter leads, digital communication, New Zealand Relay, language line, wrap-up codes, activity codes.

CRM – Customer Relationship Management System.

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

CSA adherence to schedule – a measure of the percentage of time a contact centre agent/CSR is managing interactions in relation to the time they are scheduled to do so.

CSA availability – the number of CSAs logged on and available to take interactions.

CSA interaction volume – the number of interactions handled by CSAs per specified period.

CSA not ready time – the total time the CSA is unavailable to take interactions when logged on.

CSA wait time – the time between interactions, expressed as end-of-day total or average.

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*.*

GOS/SL – Grade of Service/Service Level.

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.

IVR – Interactive Voice Response.

Presence technology – software that assesses and communicates varying levels of an individual or device's availability. Presence options may include "online", "busy", "on the phone", "in a meeting", and may differ depending on the type of organisation and/ or technology used.

Occupancy rate – the percentage of time an individual CSA or all CSAs (average) are actively occupied during interaction time and wrap-up time, usually expressed as a percentage of total logged on time.

Service level – the percentage of interactions answered within a given time.

4   Range

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

Explain and utilise current contact centre technology and systems.

Range   current contact centre technology and systems may include but are not limited to – CRM, IVR, workflow, communication systems, call forecasting and scheduling system, Presence technology, chat bots;
evidence of four technology and systems are required.

Performance criteria

1.1   Explain current contact centre technology and systems in terms of functions and impact on customers.

1.2   Utilise contact centre technology and systems consistent with contact centre procedures to resolve an enquiry.

1.3   Explain how to manage technology problems to minimise effect(s) on service levels.

Range   may include but is not limited – pre-empting failure, telephone or power outages, equipment failure.

Outcome 2

Describe functions that enable and manage the interaction delivery in a contact centre.

Performance criteria

2.1   Describe functions that enable the interaction delivery in a contact centre and the management of those interactions.

Range   functions may include but are not limited to – interaction forcing, routing of interactions, queuing and queue display, CSA availability status, post interaction work, interaction volume;
evidence of four functions is required.

Outcome 3

Explain contact centre statistics available to CSAs.

Performance criteria

3.1   Explain statistics relating to CSA interactions using a sample report.

Range   statistics may include but are not limited to – CSA not ready time, CSA availability, CSA interaction volume, occupancy rate, CSA wait time, CSA adherence to schedule, variance of interactions answered to interactions logged, interaction quality; evidence of three statistics is required.

3.2   Explain statistics relating to a contact centre's performance and how the CSA contributes to these using sample organisational reports.

Range   statistics may include but are not limited to – GOS/SL, contact centre interaction volume, abandonment rate, variance of interactions answered to interactions logged and/or received, average speed of answer, customer wait time, first interaction resolution; evidence of four statistics is required. reports may include but are not limited to – conversion rate of queue interactions, sales statistics, number of complaints, quality reports, customer satisfaction results; evidence of three reports 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 2011
Review	5	17 October 2008	31 December 2012
Review	6	9 December 2010	31 December 2017
Review	7	17 April 2014	31 December 2021
Review	8	27 September 2018	31 December 2026
Review	9	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.