

<b>Title</b>	<b>Plan and allocate work to individuals in a contact centre</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>6</b>

<b>Purpose</b>	<p>This unit standard is for people in supervisory or management positions who are responsible for planning and allocating work to others in a contact centre.</p> <p>People credited with this unit standard are able to:          plan work and work methods for individuals in a contact centre;          and allocate work and evaluate individuals against objectives in a contact centre.</p>
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<b>Classification</b>	Contact Centres > Contact Centre Management
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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  
 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;  
 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.

*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.

*Work methods* – processes that cover operational procedures and resources.

- 4 The contact centre industry considers the complexity and technology of the contact centre environment to be such that competency in the skills and knowledge covered by this unit standard cannot be fully demonstrated under simulated conditions.
- 5 **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.

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## Outcomes and performance criteria

### Outcome 1

Plan work and work methods for individuals in a contact centre.

### Performance criteria

- 1.1 Individuals are encouraged to contribute to work plans and, where suggestions can be implemented, work methods reflect the views of those involved in the work.
- 1.2 Agreed plans for work and work methods are clear and concise and specify the activities to be performed and agreed performance standards.
- 1.3 Work plans are completed that comply with relevant regulations and are in accordance with company procedures and customer requirements.  
  
**Range** regulations may include but are not limited to – legal, statutory, local body, employment contracts; requirements may include but are not limited to – budget, timeframe, quality.
- 1.4 Agreed work methods and activities optimise the use of available materials, capital, and people.
- 1.5 Planned work and work methods are communicated to end-users in a format and timeframe that allows full preparation for the planned work to be undertaken.  
  
**Range** may include but is not limited to – letter, fax, memo, email.
- 1.6 Contingencies for variations to work are considered and included in work plans.

**Outcome 2**

Allocate work and evaluate individuals against objectives in a contact centre.

**Performance criteria**

- 2.1 Allocated work is complete, clear, concise and optimises existing resources.
- 2.2 Work instructions are provided in a manner and at a level and pace that ensure the understanding and acceptance of the end-user.
- 2.3 The allocation of work is fair, consistent and relevant to the competence of the individual.
- 2.4 Planned contingencies are implemented as required and the impact of changes to work allocation on results is minimised.
- Range impact of changes includes – costs, time, quality, service.
- 2.5 Historical information is used to evaluate and improve current work practices.

**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
Review	3	26 July 2005	31 December 2011
Review	4	17 October 2008	31 December 2012
Review	5	18 March 2011	31 December 2021
Review	6	27 September 2018	31 December 2026
Review	7	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>.