

<b>Title</b>	<b>Demonstrate knowledge of workforce management within a contact centre</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	<p>This unit standard is for people in senior, supervisory or management positions who are required to have knowledge of workforce management in a contact centre.</p> <p>People credited with this unit standard are able to:          explain forecasting in a contact centre; and demonstrate knowledge of scheduling 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 References

Employment Relations Act 2000;  
 Health and Safety at Work Act 2015;  
 Human Rights Act 1993;  
 Privacy Act 1993;  
 and all subsequent amendments and replacements.

2 Definitions

*After call work* – work that a CSA is required to do following an interaction. Examples include – entering data, off-line activities, filling out forms, making follow up calls.

*Contact centre* – an organisational unit 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 exist across a wide range of industries. Examples include – 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.

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

*CSR 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.

*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.

*Forecasting* – a method used to predict contact centre workload in order to appropriately allocate staff resources.

*FTE* – Full-time Equivalent Employees.

*Scheduling* – planning when employees will be on duty, including specific activities. Includes days worked, start and stop times, and break times.

*Seasonal impact* – any event (predictable or not) which produces a spike in contact centre demand.

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

*Shrinkage* – measure of time lost through anything other than interaction communication time, approved after call work and wait time. Examples include – training, meetings, vacation, projects, breaks, absenteeism.

### 3 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

Explain forecasting in a contact centre.

#### Performance criteria

1.1 Explain the purpose of forecasting in a contact centre.

Range workforce optimisation, Service Level management.

1.2 Explain the relevance of data gathering and how it relates to forecasting.

Range may include but is not limited to – call trends, FTE, media campaigns, length of call, seasonal impact, training needs, performance reviews, team meetings, historical call data, seasonal and monthly differences, business influences; evidence of six is required.

### Outcome 2

Demonstrate knowledge of scheduling in a contact centre.

#### Performance criteria

2.1 Explain how forecasting relates to the development of individual CSA schedules in a contact centre.

2.2 Describe factors that contribute to CSA adherence to schedule in own contact centre.

Range may include but is not limited to – shrinkage, rosters, absenteeism, after call work; evidence of three is required.

2.3 Describe impact of CSA non-adherence issues from performance criterion 2.2.

Range may include but is not limited to – financial, time, compliance, health and safety, performance, Service Level, company reputation.

**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

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