

Learning Assessment Guide

Unit Standard 16775 – Version 4

Use and explain contact centre equipment and systems

Level 3 – 3 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

- tasks for you to complete
- observation checklist
- company procedure confirmation form (to be completed if the person observing you is not familiar with your company procedures)
- assessment results that the assessor will use to assess your competence.

The tasks in this assessment are designed to show your assessor that you can:

- explain the use of contact centre technology
- operate a telephone, fax, email, internet and/or intranet in the contact centre
- describe the functions of the ACD system in a contact centre
- explain contact centre statistics available to Customer Service Representatives (CSRs).

Assessment Task One – Elements 1 and 3

Task One involves you answering the following questions either verbally or in writing. Please discuss with your assessor the most suitable option.

Should it be decided that the questions are to be answered verbally then your assessor will make notes based on the answers provided. Should it be agreed that you submit your answers in writing then please use the spaces provided below.

Question 1

Please explain the use of at least **FOUR** of the following technologies used in a contact centre:

Contact Centre Technology	Expansion of acronym	Function in the Contact Centre	Impact on the customer
CTI			
CLI			
IVR			
CMS			
Call Forecasting	N/A		
Scheduling System	N/A		
Predictive Dialler	N/A		

Question 2

Please describe the functions of the ACD system in your contact centre and how they are managed in accordance with company procedures?

Include details of how the calls are distributed and managed - for example; does your centre use call forcing, routing of calls within and between centres, function of queuing and avenue display, not ready, post call programme

Assessment Task Two – Element 2

For this task you will be observed in the workplace operating the telephone, fax, email, internet and/or intranet.

There are two options available as to how the observations can be completed, please discuss with your assessor the most suitable option for your situation.

Option 1

Option 1 requires a person senior to you - either your manager, supervisor, team leader, coach - to observe you completing the required tasks. An observation checklist that has been signed by the observer then needs to be handed to your assessor as evidence.

A copy of the observation checklist can be found in this Guide.

Option 2

Option 2 requires your assessor to observe you completing the required tasks and using the observation checklist included in this pack to ensure that you meet all of the requirements.

If your assessor is not familiar with your contact centre's procedures then they will also arrange for a completed verification form to be completed by your manager, supervisor, team leader, coach or team leader.

Observation

You will be asked during the observation to show that you can do the following:

- Workstation telephone is used in accordance with company procedures
- Fax facility is used in accordance with company procedures
- Email facility is used in accordance with company procedures
- Internet and/or intranet facilities are used and maintained in accordance with company procedures

Copies of the observation checklist and company procedure confirmation form can be found below.

Observation Checklist – unit standard 16775

P.C	Criteria	
2.1	Workstation telephone is used in accordance with company procedures?	Yes <input type="checkbox"/> No <input type="checkbox"/>
2.2	Fax facility is used in accordance with company procedures?	Yes <input type="checkbox"/> No <input type="checkbox"/>
2.3	Email facility us used in accordance with company procedures? <i>Please tick when observed</i> If the learner has already achieved unit 16777 then this can be cross credited and therefore you are not required to observe this.	- Internal email <input type="checkbox"/> - External email <input type="checkbox"/> - Attachments <input type="checkbox"/> - Maintenance of e-mail files <input type="checkbox"/> OR Cross credit to 16777 <input type="checkbox"/>
2.4	Internet and/or intranet facilities are used and maintained in accordance with company procedures?	Yes <input type="checkbox"/> No <input type="checkbox"/>
All	Verified that all observations are in accordance with company procedures? <i>(if observed by the assessor who is unfamiliar with the companies procedures, please ensure that a “company procedure confirmation” from has been completed and that you refer to this when making your judgement)</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Additional Notes

Name of Observer: _____

Position: _____

Signature: _____

Date: _____

Company Procedure Verification Form – 16775

Name:

Organisation:

Position:

Contact Telephone Number:

As part of **Unit Standard 16775 – Use and explain contact centre equipment and systems**, it is required that all observations conform to your organisations specific policies and procedures. Please can you answer the following questions so that these can be referred to when observing the learner.

Please explain the company procedure with regards to the following:

Operating the workstation telephone

Operating the fax facility

Procedures and policies around the use of the company email facility

Procedures and policies around the use of the company Internet and/or Intranet facility

The company procedure concerning the distribution and management of calls and the function of your ACD system.

Thank you for your assistance

Assessment Task Three – Element 4

For this task you are required to provide your assessor with copies of statistics and/or reports that are used in your contact centre and explain their purpose and use. The following report examples are required (samples can be used):

- Minimum of one report showing the statistics relating to individual CSR results
- Minimum of one report showing the statistics relating to the contact centres overall performance results

Plus

- One other report used by the organisation - for example; number of complaints, quality reports.

You will then be required to either explain verbally or in writing how the reports relate to the functions listed in tables 1 and 2 below in your contact centre.

Your answers can be provided either verbally or in writing, please discuss with your assessor the most suitable option.

If it is agreed that your answers will be submitted in writing, please complete the following tables and attach the reports to this Guide when submitting your answers for assessment.

Please note that Table 1 relates to the individual statistics and table 2 relates to the contact centre statistics.

Table 1 – Individual CSR results

If some of the measures included in the list below do not relate to your contact centre then please use the space provided under “other” to include measures that are relevant to their situation. Overall five different statistics from the report will need to be explained.

Individual Statistics	Explanation
Not ready	
Log in time	
Number of incoming and outgoing calls	
Average and total talk times	
CSR wait time	
Other:	

Table 2 – Contact Centre results

If some of the measures included in the list below do not relate to your contact centre then please use the space provided under “other” to include measures that are relevant to their situation. Overall three different statistics from the report will need to be explained plus an explanation of the additional contact centre report.

Contact Centre Statistics	Explanation
GOS/SL	
Volume of calls	
Abandonment rate	
Other:	
Plus at least one other report used by the organisation (examples – number of complaints, quality reports) Name of report:	

Assessment Results

These are the judgements that your assessor will use to assess you.

Answers provided in Task One are correct and in-line with the model answers	Yes	No
A minimum of four technologies and their impact on the customer have been explained.	Yes	No
Answers concerning the contact centre's ACD system are correct and in accordance with company procedures.	Yes	No
All items on the observation checklist have been checked and performed correctly.	Yes	No
All items observed are in accordance with company procedure.	Yes	No
In Task Three all explanations provided are correct and demonstrate an understanding of the technology, reports and their use, in accordance with company procedures.	Yes	No