

Learning Assessment Guide

Unit Standard 19442 – Version 2

Manage the operation of a Contact Centre

Level 5 – 8 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.

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

- *Apply Erlang C traffic model to a contact centre*
- *Forecast traffic and CSR requirements for a contact Centre*
- *Rectify situations that adversely affect service levels in a contact centre.*
- *Explain call routing plans for a contact centre*
- *Explain the disaster recovery plan for a contact centre.*

This Learning Assessment Guide is made up of:

- Task(s) for you to complete.
- Questions for you to answer
- Observation Feedback form
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

Definitions

Call routing plan – a plan which defines the routing of telephone calls to one or more contact centres under different situations. The plan typically reflects time of day, day of week, geographical origins of calls, and where calls are to be answered. It is usually defined by the contact centre and applied by the telephone company.

Disaster recovery – refers to recovery from natural disasters, emergencies, and equipment or computer failures.

Erlang C – a traffic model for calculating the number of operators required in a given hour, from the number of calls arriving in that hour, the average call duration including wrap-up time, and the average call delay (answer time).

Service level – x % of calls answered within y seconds

Resources:

Book

Call Centre Management on Fast Forward by Brad Cleveland.

Published by ICMI Press and updated 2006. Reprinted 2008.

This book is a must for all contact centre managers who manage and schedule staff.

Assessment Task 1 Element 1

Introduction

This unit standard is intended for training and assessment of contact centre management, and covers various aspects related to the efficient management of the operation of a contact centre.

Task 1 requires you to answer a series of questions related to applying the Erlang C traffic model.

Instructions

The evidence required for assessment task 1 will include

Questions

Write your answers in the space provided below.

Element	Question	Actual Answer
1.all	What is an Erlang?	
	What is Erlang C?	
	What base information is required to calculate the staff required to meet Service Level objectives using Erlang C	
	When and Why do we use Erlang C?	

Assessment Task 2, Element 1

Task 2 requires you to perform an Erlang C calculation.

Instructions

The evidence required for assessment task 2 will include:

- A completed Observation Feedback form.

You will need to arrange a suitable person to observe you carrying out Erlang C calculation using given criteria. A copy of the form can be found on page 12 of the Learning Assessment Guide.

A suitable observer could be either your assessor or colleague or manager who is experienced with these types of calculations. Please discuss this with your assessor prior to commencing.

Assessment Task 3, Element 2, 3 and 4

Introduction

Task 3 requires you to complete a series of tasks to show how you Forecast traffic and Customer Service Representative (CSR) requirements; rectify situations that adversely affect service levels; explain call routing plans; and explain the disaster recovery plan.

Instructions

The evidence required for assessment task 3 will include

Tasks for you to complete

1. Provide examples of calculations and schedules you have done in your contact centre.
2. Develop a disaster recovery plan
3. Provide an example of an Erlang C calculation
4. Print out a copy of traffic reports (minimum period of four weeks) and forecast of expected traffic variations and CSR requirements to meet service levels
5. Provide examples of where service levels have been adversely affected and your assessment of the situation and the adjustments you made to staff schedules
6. Explain one call routing plan for normal operation and one for disaster recovery.

Refer to the Assessment Guide below which will provide details of what to include for each of the above tasks.

Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 19442

Element	Task	Evidence required	Judgement
1 all	Task 1	Answer all questions	All questions are correct and in line with the model answers.
1 all	Task 2	<p>Apply the Erlang C model to a contact centre.</p> <p>Give one example showing your Erlang C calculations.</p> <p>Completed Observation Feedback form</p>	<p>The example must include</p> <ul style="list-style-type: none"> • Average talk time • After call work • Number of calls • Average call delay (answer time) • Service level objectives • And may include • Average speed of answer • Average delay of delayed calls. <p>Completed Observation Feedback form confirms the learner's ability to be able to perform the calculation.</p>
2 all	Task 3	<p>Forecast traffic and CSR requirements for a contact centre.</p> <p>Print out of traffic reports (minimum period of four weeks) and forecast of expected traffic variations and CSR requirements to meet service levels including:</p> <ul style="list-style-type: none"> • historical and /or projected data • seasonal variations and holidays • specific planned activities 	<p>Must include</p> <p>at least 2 of the following and cover a minimum period of four weeks</p> <ul style="list-style-type: none"> • Marketing campaign • Mass mail out • Billing run. • One to One Coaching • Scheduled team training. <p>Or other campaigns or time specific activities.</p> <p>Forecast shows</p> <ul style="list-style-type: none"> • Expected traffic variations for the planned activities • Service Level expectations • CSR requirements for the period. <p>Must be signed off by the learner's Manager as a viable and realistic example</p>

Elements	Task	Evidence required	Judgement
3 all	Task 3	<p>Rectify situations that adversely affect service levels in a contact centre.</p> <p>Give examples of where service levels have been adversely affected. Explain your assessment of the situation and the adjustments to staff schedules using scheduling techniques.</p> <p>May include</p> <ul style="list-style-type: none"> • Unplanned absenteeism • Abnormal traffic • Low volume of traffic. • High volume of traffic <p>Explain what impact does the above have on the service levels?</p> <p>Explain what scheduling alternatives are available to rectify the situation?</p>	<p>One example to be given</p> <p>Must include:</p> <ul style="list-style-type: none"> • Assessment of impact on service levels • Adjustment to staffing schedules using scheduling techniques. • Post Review and Analysis • Impact is that the service level can be compromised. <p>May include the following but not only</p> <ul style="list-style-type: none"> • Utilisation and staggering of shifts • Adjustment of start and finish times • Adjustment of breaks • Changing meetings and training schedules • Adjust off phone work and/or administrative functions. • Schedule part timers • Offer overtime • Call back from leave or go on leave. • Sacrifice service level • Skill based routing <p>Must be signed off by the candidate's Manager as a viable and realistic example</p>

Element	Task	Evidence required	Judgement
4 all	Task 3	<p>Explain call routing plans for a contact centre</p> <p>One plan needed for normal operation and one for disaster recovery.</p> <p>Explain and give examples of situations under which call routing plans are applied and the implementation procedures.</p> <p>The flow of calls under the defined conditions is explained.</p>	<p>Expected answers must include identification and explanations of the situation and the applied call routing plan and may include any of the following.</p> <p>Skills based:</p> <ul style="list-style-type: none"> • Identification and explanation of the skills required for call types • Identification of individual agent skills and competency levels • Appropriate routing plans and implementation procedures. <p>Geographical origin of the call:</p> <ul style="list-style-type: none"> • Identification and explanation of geographical requirements impact • Identification of resource/Location availability • Appropriate routing plan and implementation procedures. <p>Availability of Agent/resource:</p> <ul style="list-style-type: none"> • Identification and explanation of resource/location availability • Appropriate routing plan and implementation procedures. <p>Must include:</p> <ul style="list-style-type: none"> • Implementation processes and procedures. • Explanation of flow of calls under the defined conditions. <p>Have a plan for such eventualities.</p> <p>Must identify that the planning involves <i>identifying scheduling approaches and flexibility</i> that is feasible in their environment.</p> <p>Must be signed off by the learner's Manager as a viable and realistic example</p>

<i>Element</i>	<i>Task</i>	<i>Evidence required</i>	<i>Judgement</i>
5 all	Task 3	<p>Develop a disaster recovery plan for a contact centre which</p> <ul style="list-style-type: none"> • Identifies how and where calls will be answered • Identifies responsibilities of all contact centre personnel • Outlines evacuation procedures where appropriate • Includes testing schedule 	<p>Must include:</p> <ul style="list-style-type: none"> • Pre event Plan and testing schedule • A plan of the escalation procedure prepared ahead of time and a definition of the service levels that will determine when alternatives are deployed. • Real time Implementation • Post Review and Analysis of what happened after the situation. What worked and what created problems <p>Must identify that the planning is flexible and feasible in their environment.</p> <p>Plan should illustrate:</p> <p>Clear processes and procedures for answering of calls during and after the event. e.g.</p> <ul style="list-style-type: none"> • call diversion to back up or alternate centre • voice mail messaging or diversion to mobile resources • Technical requirements and procedures for call diversion. • Specific personnel responsibilities and back up alternatives. <p>Clear processes and procedures for Evacuation. e.g.</p> <ul style="list-style-type: none"> • Specific personnel responsibilities and back up alternatives. • Evacuation procedure and OSH compliance checks. <p>Post emergency/recovery procedures e.g.</p> <ul style="list-style-type: none"> • Scheduling call backs/workflow • On flow effect –varied volumes of incoming calls upon return to normal operation.

Element	Task	Evidence required	Judgement
5 all	Task 3	<p>Develop a disaster recovery plan for a contact centre which</p> <ul style="list-style-type: none"> • Identifies how and where calls will be answered • Identifies responsibilities of all contact centre personnel • Outlines evacuation procedures where appropriate • Includes testing schedule <p>Continued.</p>	<p>Testing schedule</p> <ul style="list-style-type: none"> • How will you test the recovery plan e.g. <p>May include actual simulation of fire drill or other industry or location relevant disaster and when you will you schedule this including</p> <ul style="list-style-type: none"> • review of call flow busy times • scheduled marketing campaigns or other high volume activities • why will you test at this time and in this way? <p>May include any of the following but not limited to:</p> <ul style="list-style-type: none"> • Utilisation and staggering of shifts • Adjustment of start and finish times • Adjustment of breaks • Changing meetings and training schedules • Adjust off phone work • Schedule part timers • Offer overtime • Call back from leave or go on leave. • Adjust call outcome. (offer call back at non busy time) • Outsource or service bureau • Sacrifice service level • Set up telecommuting programme • Everybody takes calls including Team leaders and managers • Bring in secondary groups such as reassign agents from other call queues • adjust overflow parameters • adjust or activate delay announcements <p>Must be signed off by the candidate's Manager as a viable and realistic example</p>

Observer Feedback Form

Name of Learner:	Learner's DOB:
Name of Observer:	Phone:
Relationship to Learner:	

_____ is currently being assessed toward Unit Standard
19442 Manage the operation of a contact centre.

Purpose of this form

Learner's use this form to gain feedback to support their assessment for this unit standard. This form should be completed by an approved observer or assessor who has observed the learner in a situation where they had the opportunity to demonstrate their competence in the performance criteria for this unit standard.

For the purpose of this unit standard you will need to observe the candidate carry out an Erlang C calculation, given specific criteria

Situation (please give brief details of the situation in which you observed the learner's performance):

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In the situation you describe above, do you believe the learner has met the requirements of each of the following performance criteria for this unit standard?

Performance criteria	The Learner has met the criteria
<p><i>1.1 Calculated the numbers of CSR's required to achieve given service levels using the Erlang C model</i></p> <p>To effectively apply Erlang C to a given situation to calculate/estimate resource requirement to reach expected service level. Must include:</p> <ul style="list-style-type: none"> • Total calls offered during the set period. • Number of agents logged on for that period • Average talk time. • Average after call work • Service Level Objectives (x percentage of calls answered in y seconds) • Average call delay (answer time) <p><i>The learner may use any of the following to achieve the results.</i></p> <p><i>Erlang C calculator</i></p> <p><i>Telephony software that includes Erlang C</i></p> <p><i>Tables.</i></p>	<p style="text-align: center;">Yes <input type="checkbox"/> No <input type="checkbox"/></p>

Comments (you can use this section to elaborate on any special features of this activity, and to take notes for your own feedback to the learner. Continue on another sheet if necessary, and attach to this form. Note: The assessor will discuss your comments with the learner, so only record comments you are comfortable sharing.)

Thank you for your assistance.

Signed: _____

Date: _____