



## Contact Centre

National Occupational Standards (NOS)

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URN	NOS Title
INSCC001	Use contact centre systems and technologies to handle customer contacts
INSCC002	Develop and manage strategies for use of contact centre systems and technologies
INSCC003	Deliver customer service in a contact centre
INSCC004	Manage customer service in a contact centre
INSCC005	Carry out sales activities in a contact centre
INSCC006	Manage direct sales operations in a contact centre
INSCC007	Manage customer communication over complex matters
INSCC008	Manage team and individual performance in contact centre
INSCC009	Provide information and support about services and products in a contact centre
INSCC010	Manage resource planning and improve resource allocation in a contact centre
INSCC011	Manage incidents and emergencies in a contact centre

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## Overview

This standard is about using contact centre systems and technologies to handle customer contacts. These are used for handling customer contacts and accessing information required in your role. The standard addresses accessing customer information, dealing with customers, using a range of available technologies and functionalities to enhance customer service with the main focus on first contact resolution. It involves identifying the categories of contact you are authorised to deal with, understanding the organisational procedures for handling contacts, using technology systems and variety of contact methods (telephone calls, social, live chat, web chat, etc.) to input contact information and understanding when to refer contacts to colleagues when you are unable to support them. It also involves agreeing organisational reports required, using technologies to produce reports and checking these reports before using them and sharing them with others

The standard is for contact centre professionals who are required to use contact centre systems and technologies to handle customer contacts.

## Performance criteria

### *You must be able to:* **Handle customer contacts in the contact centre**

1. use contact handling systems to deal with customers
2. handle contacts identified by the contact distribution system
3. identify the categories of contact that you are authorised to handle and who to pass other contacts on to
4. access customer information through the system in accordance with organisational procedures
5. identify what you need to do if contact with the customer becomes too complex or difficult to respond to
6. describe and apply the organisational procedures and guidelines needed to complete each type of contact
7. identify the organisational systems and technologies that support your handling of contacts

### **Use contact centre systems and technologies to carry out customer contacts**

8. log into the appropriate technology system to deal with customer contacts within your area of responsibility
9. establish customer identity from information they give and validate it using information from the system
10. identify who you would need to refer to if the information given cannot be validated
11. follow defined pathways through the technology system to complete customer contact tasks
12. use features of the telephony contact handling system to control customer contacts
13. locate information on the system needed to complete a customer contact
14. refer the call to an authorised colleague if you cannot complete the customer contact
15. input information to the system following organisational procedures
16. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

### **Use features of systems and technologies to handle customer contacts with a contact centre**

17. make adjustments to individual system settings for communication with customers through telephony, web technologies, radio or other

interactive functionalities

18. use technologies appropriately by making choices between different functionality to enhance customer service

19. explain the benefits and procedures of different technology systems for communication with customers

**Report on customer and contact handling information using pre-defined formats**

20. deal with customers on first contact basis to resolve any issues or concerns or refer the contact to the relevant member of staff

21. identify customer and contact handling information require for work planning or organisational reporting

22. agree organisational report needs with a team leader or other member of staff with appropriate authority

23. make any required adjustments to pre-defined report formats to ensure that outputs are as agreed

24. use software functionality to produce pre-defined customer information and contact handling reports

25. check report results for accuracy before making full use of them

26. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

*You need to know and understand:*

1. the information about the services and products offered or supported by the contact centre
2. the contacts you are authorised to handle
3. how to record and input information following organisational procedures
4. the organisational procedures and guidelines for handling different types of customer contacts
5. the organisational systems and technologies required to support handling customer contacts
6. the variety of contact methods through relevant systems and technologies
7. the process for referring contacts when these are outside the limits of your authority
8. the procedures for logging on to the technology systems
9. the procedures for identification and validation of customer identity
10. how to respond to prompts from the system indicating the pathway to be followed
11. the features of the telephony contact system required to control customer contacts
12. the techniques for locating information on the contact centre system
13. the organisational requirements and external regulation or legislation that impact on contact centre operations
14. the organisational procedures and guidelines for customer contact handling
15. the organisational procedures for customer identification and identity validation
16. the purpose of contact distribution systems and how your own organisation's system works
17. the features of your organisation's customer information systems that enable you to deal with customers on first contact basis
18. the system settings that enable you to access different interactive functionalities
19. how to make choices between different interactive functionalities to optimise customer service
20. the benefits of different technologies for dealing with customers

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21. how to identify information required in reports for planning or organisational feedback
  22. the importance of agreeing report content with a team leader or person with appropriate authority
  23. the types of adjustments that may be required to pre-defined reports
  24. the software features and functions to produce pre-defined reports
  25. the importance of checking report output for accuracy before use
  26. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

INSCC001

Use contact centre systems and technologies to handle customer contacts



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## Overview

This standard is about developing and managing strategies for use of contact centre systems and technologies. It covers updating and defining system configuration parameters to optimise overall performance of the systems and technologies in a contact centre. It involves reviewing and defining of these systems to ensure that day-to-day service can be delivered within required performance levels and targets. It also involves identifying potential system enhancements and modifications required within own area of responsibility. You will contribute to organisational policies and overall business strategy about use of systems and technologies. It is for contact centre professionals on supervisory or managerial levels who develop and manage strategies for use of systems and technologies in a contact centre.

## Performance criteria

- You must be able to:*
- Update and define system configuration parameters to optimise performance**
    - review and analyse monitoring reports and metrics to identify opportunities to improve system performance
    - review current configuration parameters against performance metrics
    - identify options for changes to system configuration to improve performance, if required
    - work with colleagues to identify practical opportunities for system improvement through configuration parameter changes
    - select and implement configuration parameter changes to improve performance
    - set routing rules to establish contact priorities which meet customer expectations with normal resource availability
    - analyse the effects of alterations to applications and systems
    - identify data flows between the systems
    - identify the advantages and disadvantages of different routing parameters
    - establish predictive contact queuing rules to manage contacts
  - Review, define and agree strategy for contact centre systems**
    - identify organisational strategy for contact centre systems and technologies
    - review contact centre systems and technology against current and anticipated business requirements
    - define strategy for contact centre systems and technologies
    - consult with appropriate colleagues to agree a strategy for a contact centre's systems and technologies
  - Develop policy for continuity and on-going development of systems**
    - identify and agree organisational policy for operational continuity of systems
    - review systems and technologies to identify opportunities for system enhancements and modifications
    - assess risks associated with breach of operational continuity resulting from systems or technology failure
    - use review information to devise detailed operational continuity plans for systems

19. identify positive steps to mitigate risks associated with systems or technology failure
20. consult and agree with relevant colleagues practical policies to ensure operational continuity of systems and technology
21. contribute to the development of organisational policy for operational continuity of systems

**Contribute to overall business strategy about use of systems and technology**

22. identify key aspects of overall business strategy that are influenced by systems and technologies
23. analyse features of systems and technologies that provide most opportunities to contribute to overall business strategy
24. work with colleagues to ensure that systems and technology strategy complements overall business strategy
25. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and use of technologies

## Knowledge and understanding

*You need to know and understand:*

1. the services and products offered or supported by the contact centre
2. the external regulation and legislation that impact on the operations of the contact centre and its systems
3. how to select and arrange data during the production of contact centre system reports
4. how to identify changes to data flow resulting from adjustments and alterations to systems
5. the techniques for assessing individual and team needs for support in the delivery of contact centre services
6. the options for activities to develop team and individual skills
7. the performance metrics of contact centre operations
8. the importance of contact centre metrics in the reporting of contact centre activities
9. the system configuration parameters and how they can be used to improve efficiency and effectiveness
10. the current and anticipated business requirements for use of systems and technologies
11. the benefits and drawbacks of different routing parameters
12. the options for routing rules and other system configurations that can be used to improve service
13. the routing rule options including predictive wait time, agent skills base, workload, time of day, day of the week and contact location
14. the organisational procedures and guidelines for contact centre operations
15. the structure of contact centre tasks that are affected by operational continuity issues and overall business strategy
16. the importance of decision pathway analysis in contact centre system design
17. the organisational business strategies that may impact on systems and technology strategies
18. the techniques for developing and presenting business strategies and policies that adapt to systems and technology situations
19. why performance optimisation is a central requirement for any proposed strategy and how it can be measured
20. the types of policy drivers that may result from system and technology guidelines

21. how to evaluate the potential benefits and cost implications from system modifications and enhancements
22. the importance of presenting recommendations for modifications or enhancements with evidence of potential benefits and resource implications
23. the risk assessment techniques that adapt well to use with contact centre systems and technology
24. the options for mitigating risks associated with system and technology failure in a contact centre
25. the importance of making appropriate links between overall business strategy and systems and technology strategy in a contact centre
26. the importance of agreeing policies and strategies with appropriate colleagues
27. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and use of technologies

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**Keywords** Contact Centre, contact centre systems operations, contact centre technology, system configuration, system enhancements, system policy, system performance

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## Overview

This standard is about delivering customer service in a contact centre. It covers the actions you need to take when carrying out contact centre activities. It involves communicating with customers to ensure their expectations are met with main focus to operate on first contact. It is important to follow organisational and regulatory requirements during customer contacts. You will use effective questioning and listening skills to gather customer satisfaction feedback from customers to identify ways to improve customer service. This standard covers monitoring and analysing customer service performance and informing colleagues of the results to identify actions for improvements. It is for contact centre professionals who are responsible for delivering customer service.

## Performance criteria

- You must be able to:*
- Communicate with customers and establish rapport to meet their expectations**
    1. identify and greet customers following organisational guidelines
    2. use active listening to identify your customers' queries or requests
    3. check you have understood your customers by summarising their queries or requests
    4. provide your customer with information about services and products in response to their enquiries and requests
    5. explain features and benefits of services and products to customers
    6. discuss issues or queries with customers and identify options to resolve them
    7. check your customer's understanding of the information you have given
    8. close the customer contact following organisational guidelines
    9. close the customer contact in a professional, respectful and polite manner
  - Meet organisational and regulatory requirements during customer contact**
    10. follow organisational and regulatory guidelines during contact with customers
    11. establish and explain the limits of your authority when dealing with customers
    12. communicate with customers to resolve difficulties relating to customer identification and validation
    13. deal with complex customer contacts referred from colleagues where their levels of competence or authority have been exceeded
    14. explain organisational and regulatory constraints to customers when they affect the customer service you can offer to them
    15. refer customers to colleagues, when their request exceeds your level of competence or authority
    16. use different sources of information to check and update your knowledge and understanding of organisational and regulatory requirements
  - Gather and use customer satisfaction information to support customer service delivery**
    17. identify customer satisfaction questions that you are required to



ask

18. ensure your customer is satisfied with the information and service you have provided
19. use information collected from customers to adapt and improve your customer service delivery
20. refer customer problems or negative comments to a colleague with appropriate authority where necessary
21. record responses to customer satisfaction questions following organisational guidelines

**Monitor and analyse customer service performance**

22. identify key performance indicators (KPIs) for customer service delivery in a contact centre
23. implement monitoring activities to assess customer service performance against key performance indicators
24. validate data obtained when monitoring customer service performance and review against other identified sources of evidence
25. identify key organisational and regulatory compliance requirements for customer service delivery
26. inform colleagues of monitoring results, to identify actions for improvement
27. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

*You need to know and understand:*

1. the organisational guidelines on how to greet and identify customers in a contact centre
2. the ways to demonstrate active listening when interacting with customers and why this is important
3. how to use the conversation techniques to demonstrate your understanding of the customers' queries or requests
4. the services and products offered by your contact centre
5. the features and benefits of the services and products offered or supported by the contact centre
6. the limits of your competence or authority for dealing with customer problems and complaints
7. the details of the services and products offered or supported by the contact centre in order to handle more complex queries
8. the types of issues or problems that you are able to deal with on first contact and the options available for resolving them
9. the importance of supporting colleagues by dealing with customer queries and issues that are outside the limits of their authority
10. the organisational procedures and requirements for identification and validation of customers
11. how to check the customers' understanding of the information you have provided and why this is important
12. the importance of closing a customer contact in a professional way, following organisational guidelines
13. the importance of showing respect and politeness when dealing with customer contacts
14. the organisational and regulatory guidelines you are required to follow during contact with customers
15. the sources of information to check and update your knowledge and understanding of organisational and regulatory requirements
16. how customer satisfaction can be influenced by your behaviour towards the customer
17. the organisational procedures for checking customer satisfaction during a customer contact
18. the questions to ask a customer to check their level of customer satisfaction
19. how to monitor and analyse customer service performance
20. the key performance indicators (KPIs) for customer service

delivery

21. the data validation principles
22. the actions for improvement as a result of monitoring data reports
23. how to use information collected to adapt and improve your customer service delivery
24. the relevant members of staff to refer customer problems or negative comments to if they are revealed during customer contact
25. the organisational requirements for record-keeping on customer contacts and customer feedback
26. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and use of technologies

Deliver customer service in a contact centre

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**Suite** Contact Centre

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**Keywords** Contact Centre, customer service, customer contact, communication, customer expectation, customer satisfaction, organisational requirements, regulatory requirements

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## Overview

This standard is about managing customer service in a contact centre. It covers the overall management of customer service activities, agreeing authority boundaries for colleagues dealing with customer enquiries and requests, managing escalation procedures for all difficult customer issues and dealing with customer issues that may be of high risk or high profile. It also involves reviewing organisational requirements in accordance with regulation and legislation and updating customer service procedures and compliance requirements. It is for contact centre professionals on supervisory or managerial levels who have responsibility for managing customer service in a contact centre.

## Performance criteria

- You must be able to:* **Manage escalation processes for difficult customer service issues in a contact centre**
1. identify and agree authority boundaries for colleagues dealing with complex customer issues, concerns or complaints
  2. confirm boundaries of authority with colleagues at all levels
  3. deal with complex or difficult customer issues referred by colleagues who do not have the appropriate competence or authority
  4. deal with customer issues that may be high risk or high profile
  5. identify ways to prevent the re-occurrence of customer service issues
  6. support team leaders and managers in reinforcing the escalation and complaints procedures
  7. manage monitoring of customer service performance and customer feedback
  8. devise and agree key performance indicators for customer service
  9. coordinate monitoring activities to assess customer service performance against agreed key performance indicators
  10. collate and analyse results from monitoring of customer service
  11. check results of customer service monitoring for compliance with organisational and regulatory requirements
  12. work with team leaders, managers and colleagues to develop and improve monitoring procedures for customer service performance
- Review and update organisational and regulatory requirements for customer service delivery**
13. identify existing organisational and regulatory requirements that impact on customer service delivery in the contact centre
  14. review organisational strategies and policies that may involve changed requirements for customer service delivery
  15. review external regulation or legislation that may involve changed requirements for customer service delivery
  16. consult team leaders, managers and colleagues who deliver customer service, on the implications of changes in organisational or regulatory requirements
  17. agree and implement changes in organisational or regulatory requirements in customer service procedures for contact centre activities
  18. follow current legal, regulatory and data protection requirements,

codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

*You need to know and understand:*

1. the ways of defining authority boundaries for people dealing with customer service issues and complaints
2. how to ensure colleagues at all levels understand agreed boundaries of authority
3. the techniques for dealing with complex or difficult customer issues
4. types of customer service or problems that may become high risk or high profile and how to manage them
5. how to prevent the recurrence of customer service issues
6. The organisational customer service procedures and how to support team leaders and managers in reinforcing the escalation and complaints procedures  
how to manage monitoring of customer service performance and feedback
7. the techniques for devising and agreeing key performance indicators (KPIs)
8. how to coordinate monitoring activities to assess customer service performance against agreed key performance indicators
9. how to collate analysis customer service monitoring results
10. the details of the organisational and regulatory requirements for customer service delivery
11. how to check that the results of customer service monitoring comply
12. the importance of working with team leaders, managers and colleagues to develop and improve monitoring procedures for customer service performance
13. the sources of information about organisational strategies and policies and external regulations or legislation that impact on customer service delivery
14. the process for reviewing organisational strategies and policies that may involve changed requirements for customer service delivery
15. the processes for reviewing the customer service delivery in accordance with regulation or legislation
16. the importance of consulting team leaders, managers and colleagues who are responsible for customer service delivery
17. the implications of changes in organisational or regulatory



requirements

18. how to agree and implement changes in organisational or regulatory requirements in customer service procedures
19. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Manage customer service in a contact centre

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<b>Relevant Occupations</b>	Adviser; Agent; Contact centre operator
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## Carry out sales activities in a contact centre

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### Overview

This standard is about carrying out sales activities in a contact centre. This involves handling incoming and outgoing contacts through variety of communication channels (telephone calls, live chat, web chat, social media), identifying sales opportunities and providing information to customers to develop interest in the services and products of the contact centre. You will be required to sell services and products you are familiar with and use sales techniques to make the most of opportunities that arise. It is for contact centre professionals responsible for selling services and products directly to the customer.

Carry out sales activities in a contact centre

## Performance criteria

*You must be able to:* **Carry out sales activities in a contact centre**

1. access customer, services and product information to prepare for direct sales activity in a contact centre
2. establish customer wishes and needs through questioning and active listening
3. match customer wishes and needs to available services and products to offer options
4. respond to customer questions and queries
5. adapt your selling style and technique to mirror customer wishes and behaviours
6. close the sale by agreement with your customer during customer contact
7. confirm and record your customers' order

### **Gather and use specified sales information for sales activities**

8. gather and collate information about the services and products available through direct sales
9. gather and assess customer information held which will support sales activities
10. collect information from customers that supports potential sales and helps to identify their needs
11. provide information to customers about the services and/or products that are available
12. check customer information with customers to ensure that all details are correct
13. keep appropriate records of customers
14. research potential new customers

### **Contribute to direct sales to customers in a contact centre setting**

15. establish customer identity, using organisational security protocols, to access customer information to support the sales process
16. establish customer needs for potential sales of services and products within your authority
17. record your customers' needs using your organisation's systems and procedures
18. use information expressed by customers to identify possible matches with available services and products
19. present features and benefits of services and products to customers

## Carry out sales activities in a contact centre

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20. respond to customer questions and objections
21. adapt your sales approach and style to customer preferences
22. identify and act on for cross and up-selling
23. confirm customer requirements and needs to close the sale
24. check the accuracy of the order you have recorded with your customer
25. complete authorisation or payment details to finalise the sale with your customer
26. pass customer contact to a colleague with authority if a sales request is beyond your authority

### **Keep sales records relating to direct sales through a contact centre**

27. follow organisational procedures to identify and record customer and services and product data during the sales process
28. retrieve information as required from sales records
29. use sales records to update customer information that supports the sales process

### **Comply with relevant regulations and legislation during direct sales in a contact centre**

30. identify regulatory requirements which impact on direct sales activities through a contact centre
31. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and sales activities

Carry out sales activities in a contact centre

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## Knowledge and understanding

*You need to know and understand:*

1. the range of services and products available for sale
2. the features and benefits of available services and products that impact on the sales process
3. the sources of information about the services or products that you are able to deal with
4. how to present information to customers about the range of services and products for sale
5. the organisational procedures for establishing customer identity in a contact centre transaction
6. the sources of sales data from direct selling through a contact centre
7. the sources of market and customer data from direct selling through a contact centre
8. the sales processes and techniques used in your organisation for making direct sales
9. the techniques and procedures for confirming customer needs and closing the sale
10. the importance of checking accuracy of customer information with the customer
11. the records that need to be kept regarding customer information
12. how to carry out research for potential new customers
13. the techniques for handling objections and questions from customer during sales activities
14. the importance of adapting your style and approach to mirror customer style and perspective
15. how to set sales targets including cross-selling and up-selling
16. how to maintain sales records in accordance with organisational procedures
17. how to retrieve information from organisational sales records
18. the techniques for linking customer requirements with available services or products
19. the common concerns and questions raised by customers during direct sale
20. how to adapt your sales approach to suit customer preferences
21. how to identify cross-selling and up-selling opportunities
22. the process for confirming customer requirements to close the

sale

23. the limits of your authority to complete sales transactions
24. the colleagues who can take over a customer transaction when it is beyond your competence or authority
25. how to maintain sales records in line with organisational procedures
26. how to retrieve information from organisational sales records
27. the information required to complete a sale
28. the organisational procedures for recording sales details
29. the organisational procedures for taking payment or establishing order authority with your customer
30. the organisational policies and procedures for direct sales through contact centre dealings with customers
31. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and sales activities

Carry out sales activities in a contact centre

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## Overview

This standard is about managing direct sales activities in a contact centre. You will gather sales information and use relevant techniques and styles to meet sales objectives. It also involves sales planning, analysing sales and reporting on results. You will also contribute to sales planning and development of organisational sales strategies. It is for contact centre professionals on supervisory or managerial levels who have responsibility for managing direct sales operations.

## Performance criteria

*You must be able to:* **Define information and techniques to be used for direct sales through a contact centre**

1. identify the sales strategy for a contact centre direct sales operation
2. define sales information that is needed to achieve sales objectives
3. check that the sales information required can be collected without hampering sales activities
4. define the sales style and techniques to be used to achieve direct sales objectives
5. organise the development of procedures and guidelines for team members making direct sales through a contact centre
6. test procedures and guidelines involving colleagues who carry out sales activities to ensure they are practical in a contact centre
7. monitor supervision and management of direct sales activities during and after implementation of new procedures

**Review sales planning, analysis and reporting techniques for direct sales through a contact centre**

8. collate customer, market and sales information required for sales planning
9. review current sales plans and methods for devising them
10. implement ways of improving sales planning relevant to direct sales through a contact centre
11. identify sales analysis needed to achieve sales objectives and plans
12. contribute to the design of sales analysis tools to monitor sales and improve sales performance in direct selling through a contact centre
13. define sales reporting requirements to monitor and improve direct sales performance in a contact centre

**Contribute to the development of organisational sales strategy**

14. interpret sales information and analysis related to direct sales in a contact centre and relevant to organisational sales strategy
15. identify key features of organisational sales strategy that impact on direct sales operations through a contact centre
16. recommend developments in sales strategy that would improve overall sales performance
17. follow current legal, regulatory and data protection requirements,

codes of practice and organisational policies and procedures relating to handling personal information and sales activities

## Knowledge and understanding

*You need to know and understand:*

1. the strategic aspects of the range of services and products covered by contact centre direct sales
2. the current organisational approaches and systems for direct sales
3. the regulation and legislation that impacts on direct sales operations through a contact centre
4. the options for sales strategies for direct sales operations in a contact centre
5. the sales information required and techniques for collecting it, through direct sales activities
6. how to define sales styles and techniques for achieving sales objectives
7. how to devise and present effective guidelines for staff making direct sales through contact centres
8. the methods for testing guidelines and procedures
9. the monitoring techniques for the supervision and management of direct sales activities when implementing new procedures
10. the sales planning techniques and how to make improvements, making use of customer, market and sales information
11. the sales analysis techniques and how to specify sales analysis requirements
12. the options for sales monitoring and analysis tools
13. the sales reporting techniques and options
14. how to interpret sales information and analysis to ensure it aligns to organisational sales strategy
15. how to make clear links between organisational sales strategy and direct sales operations
16. the options for recommending improvements in organisational sales strategy
17. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and sales activities

## Manage direct sales operations in a contact centre

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## Overview

This standard is about managing customer communication over complex matters in a contact centre. It covers providing support and guidance to ensure that colleagues handle all levels of communications from simple to complex, whilst meeting all organisational procedures and guidelines. It involves both verbal and written communication with customers over complex matters. Sometimes a specialist support may be required to resolve complex matters raised by customers. You will also work with colleagues to develop customer service procedures and guidelines for communicating with customer and monitor their implementation to align with organisational communication policy objectives. It is for contact centre professional who are responsible for managing the customer communication over complex matters.

## Performance criteria

*You must be able to:*

### **Communicate with customers verbally over complex matters**

1. deal with customers' conversations referred by colleagues with limited authority
2. initiate conversations with customers about complex matters regarding services and products handled by the contact centre
3. deal verbally with complex queries initiated by customers about the services and products
4. adapt your use of language and vocabulary to meet the needs and understanding of customers
5. communicate a message to a customer that clearly sets out at least two alternative points of view

### **Communicate with customers in writing over complex matters**

6. deal with complex customer matters in writing referred to you by colleagues with limited authority
7. initiate an exchange in writing with a customer about complex information or issues
8. respond in writing to complex queries initiated by customers regarding services and products offered or supported by the contact centre
9. adapt your writing style and language to meet customer needs whilst remaining within organisational guidelines
10. explain to a customer in writing the relative merits of at least two alternative points of view

### **Set an example and support colleagues who are communicating with customers through a contact centre**

11. monitor communication between colleagues and customers for compliance with organisational guidelines and overall effectiveness
12. provide colleagues with feedback and guidance about verbal and written contacts with customers

### **Support development of customer communication procedures and guidelines in a contact centre**

13. identify organisational business and customer service objectives
14. identify and evaluate the benefits and costs of choosing different media for communication with customers
15. consult front line customer contact colleagues about the needs of customer communication
16. consult with specialist support for complex matters' resolution

17. develop and agree with management, the customer communication policies for use in the contact centre with different customer types

18. link customer communication policy with customer service objectives to help development of procedures and guidelines

19. audit procedures and guidelines for compliance with customer communication policy and ensure that they are fit for purpose

**Contribute to team skills development to enhance customer service through effective customer communication in a contact centre**

20. review team and individual communication skills in the contact centre context

21. evaluate the contribution of skills development activities to achievement of communication policy objectives

22. develop, agree and implement team and individual development plans to improve communication skills levels

23. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information



## Knowledge and understanding

*You need to know and understand:*

1. the range of services or products offered or supported by your contact centre
2. the organisational requirements and external regulations that impact on communication with customers through the contact centre
3. the organisational procedures and guidelines on written communication with customers
4. the benefits and drawbacks of choosing verbal or written communication with customers
5. the limits of authority of colleagues dealing with complex exchanges with customers
6. the techniques for adapting language and vocabulary to customer needs when dealing with complex queries
7. how to present information to customers which offers two clear alternatives
8. the formal and informal methods for monitoring communication between colleagues and customers
9. the techniques for providing colleagues with feedback and guidance about verbal communication
10. the techniques for providing colleagues with feedback and guidance about written communication
11. the key components of a customer communication policy
12. the organisational customer service objectives
13. the benefits and costs of different media for communicating with customers in a contact centre
14. the importance of consulting front line colleagues about the practical needs of dealing with customer communication
15. the specialist support for complex matters' resolution
16. the techniques for devising procedures and guidelines for use by front line staff when communicating with customers
17. the importance of linking communication policies and guidelines to customer service objectives
18. the methods of auditing customer communication policy and guidelines for compliance and ensuring they are fit for purpose
19. the importance of planning skills development actions at team and individual levels in terms of developing team and individual communications skills

20. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Manage customer communication over complex matters

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## Overview

This standard is about managing team and individual performance in contact centre operations. It involves identifying ways to obtain and provide feedback and supporting teams and members of staff to gather performance feedback from a variety of sources. You will be required to analyse feedback to identify common themes. It also involves organising buddying or coaching support to contribute to continuous improvement. It is for contact centre professionals on supervisory or managerial levels who are responsible for managing team and individual performance.

## Performance criteria

*You must be able to:*

### **Organise performance-based feedback in a contact centre**

1. identify a range of routes for obtaining and providing feedback on performance in contact centre operations
2. work with colleagues within organisational policy to allocate responsibility for contact centre performance management
3. support team and individual initiatives to obtain feedback on performance from varied sources
4. work with colleagues to identify ways to use feedback to improve performance

### **Organise team and individual performance improvement activities resulting from feedback about contact centre operations**

5. analyse feedback on performance to identify common themes where there are opportunities for improvement
6. work with teams to agree actions for performance improvement
7. agree with team leaders, strategies for team building and the improvement of team performance
8. monitor performance improvement actions by teams and individuals to measure outcomes
9. coordinate strategies to deal with working under pressure in contact centre operations

### **Manage organisational change and employee retention in contact centre operations**

10. work with team leaders to identify key changes that require active management
11. develop and adapt procedures and guidelines for contact centre operations
12. organise buddying and coaching support that contributes to the management of change in contact centre operations
13. identify factors that are influencing staff retention
14. seek opportunities to obtain formal and informal feedback on work satisfaction and reasons for resignation
15. advise the organisation on steps that can be taken to improve staff retention in contact centre operations
16. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

*You need to know and understand:*

1. the range or services or products offered or supported by your contact centre
2. the organisational requirements and external regulation and legislation relevant to contact centre operations
3. the organisational procedures and guidelines for contact centre operations that impact on performance
4. the importance of ensuring that performance management activities become part of day to day work and management within contact centre teams
5. the different sources and ways of obtaining feedback about performance in contact centre operations
6. the roles and responsibilities for performance management actions in contact centres
7. the activities that can contribute to obtaining performance feedback in contact centre operations
8. the importance of working with colleagues to identify ways to use feedback on performance
9. the techniques for analysing performance in contact centre operations
10. the importance of working with teams to agree actions to improve performance in contact centre operations
11. the strategies for team building and developing performance
12. how to measure and monitor performance improvement actions and outcomes
13. the strategies to deal with working under pressure in contact centre operations
14. the features of changes that demand active management in contact centre operations
15. the techniques for adapting or developing procedures for contact centre operations
16. the buddying and coaching techniques to support management of change
17. the factors that impact on staff retention in contact centre operations
18. how to establish common reasons for staff turnover which can be mitigated through management actions
19. how to present recommendations for actions on staff retention to

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- management colleagues
20. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

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## Overview

This standard is about providing information and support about services and products in a contact centre. It involves following organisational guidelines to comply with regulation or legislation during customer contact. You will establish and verify the identity of customers, provide information specific to their requests and refer calls to colleagues when you are unable to resolve the customer queries. It is for contact centre professionals providing information and support about services and products in a contact centre.

## Performance criteria

- You must be able to:*
- Follow organisational customer service guidelines for handling contacts**
    1. follow organisational guidelines relating to language and conversation
    2. use communication equipment handling customer contacts
    3. deal with customer contacts for specific information across a range of services or products
    4. ensure compliance with relevant organisational regulations and legislation during customer contact
  - Establish and validate customer identity**
    5. link your customers' identity with the organisation's records, where applicable
    6. use organisational security protocols to confirm your customer's identity
    7. follow organisational procedures to record any departure from the standard authorisation pattern
    8. explain to your customer the reasons for verifying their identity and options when unable to do so
  - Support customer needs for information and decisions about services or products**
    9. communicate information to customers about a specified range of services or products
    10. respond to customer's queries about a range of services or products and ensure the customers' understanding
    11. maintain and update your own knowledge about the range of services or products offered
    12. support customers who are making decisions about services and products
    13. offer customers options for different actions about services or products
    14. resolve customer requests or problems within your own level of authority
    15. refer customer requests or problems to a colleague with authority when you cannot deal with the matter
    16. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

*You need to know and understand:*

1. the range of services and products that you can deal with during customer contacts
2. the features of services and products you can describe during customer contacts
3. the organisational guidelines on use of language and conversations with customers
4. how to use key features of communication equipment during communication with customers
5. your own level of authority for dealing with customer contacts about a range of services and products
6. the regulations and legislation that impact on your contact with customers and their identification
7. the reasons why the organisation's procedures are necessary for communication with customers
8. how to check customers' understanding of the information about products and services
9. the ways of maintaining and updating your knowledge and understanding of services and products
10. how to guide customers making decisions about services and products
11. the options available to your customers when making decisions about services and products
12. the relevant member of staff to refer customers to when a request or problem is outside of your competence or authority
13. the organisational procedures for recording details of contact with customers
14. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

INSCC009

Provide information and support about services and products in a contact centre



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**Keywords** Contact Centre, customer service, customer contact, organisational guidelines, customer identification, customer support, product and service information

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## Overview

This standard is about managing resource planning and improving resource allocation in a contact centre. It covers monitoring the demand for services within a contact centre environment and how resources are managed. It involves monitoring activity levels, forecasting demand, planning and allocating resources. You will review approaches to demand, forecasting and analysis; you will work with colleagues to share information on trends and recommend any changes to organisational resource policies. It is for contact centre professionals on supervisory or managerial levels who manage resource planning and improve resource allocation in a contact centre.

## Performance criteria

*You must be able to:*

### **Devise and develop organisational approaches to demand forecasting in a contact centre**

1. identify organisational strategy and objectives that provide pointers for future demand levels
2. identify metrics that represent demand for contact centre services
3. monitor short term demand to analyse immediate resource needs for contact centre staff
4. review current organisational approaches to demand forecasting and identify potential alternative models
5. apply forecasting techniques to predict future demand for contact centre resources
6. assess confidence limits of demand forecasts
7. identify current available employee data to match resources against demand forecasts
8. identify anticipated changes in demand for contact centre resources and the reasons for these changes

### **Communicate resource information to appropriate colleagues**

9. summarise and brief colleagues on demand trends and forecasts, resource availability and implications for meeting organisational objectives
10. agree on resource demands and factors that influence the allocation and deployment of resources
11. consult colleagues about different options for ensuring that resources can be deployed to meet demand

### **Carry out scheduling and staffing activities**

12. analyse demand forecasts to identify resource requirements in a contact centre area
13. identify staff availability, constraints and preferences for work scheduling
14. analyse scheduling requirements within overall demand forecasts
15. use appropriate planning tools to create resource plans
16. allocate and deploy resources in the contact centre in a way that optimises efficiency and effectiveness
17. modify schedules to meet identified changes in demand

### **Contribute to the development of resource policies in a contact centre**

18. identify current organisational resource policies in the light of

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organisational objectives

19. review organisational resource policies in the light of organisational objectives
20. consult with colleagues regarding resource policies and the need for any developments
21. recommend and agree changes to organisational resource policies
22. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

*You need to know and understand:*

1. the range of services or products offered or supported by your contact centre
2. the organisational requirements, external regulation and legislation relating to resource development
3. the organisational strategies and objectives that may impact on resource planning
4. the organisational procedures and guidelines relating to resource development
5. the importance of using metrics in resource planning in the context of efficient and effective contact centre operations
6. the techniques for monitoring and analysing immediate resource needs in a contact centre
7. the methods of demand forecasting to predict future requirements for contact centre operations
8. the importance of using confidence limits in demand forecasts in contact centres
9. the types of employee and work record data that can be held
10. how to use employee data and work records to contribute to resource planning in a contact centre
11. the sources of information that enable you to predict changes in demand and identify the reasons for them
12. the importance of communicating with colleagues about contact centre demand levels, resource availability and resource plans
13. the importance of reaching agreement with colleagues on allocation and deployment of resources
14. the techniques for identifying different options for meeting resource demands
15. the planning tools for resource scheduling
16. how to analyse demand forecasts to identify and agree resource requirements
17. the importance of considering staff availability, constraints and preferences when carrying out work scheduling
18. the modifications that may be required to scheduling activities
19. the techniques for managing changes in resource policies for contact centre operations
20. how to identify and review resource policies against organisational objectives



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21. the importance of consulting with colleagues on resource policies to identify changes and improvements
  22. how to present recommendations for changes to resource policies
  23. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

INSCC010

Manage resource planning and improve resource allocation in a contact centre



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**Suite** Contact Centre

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**Keywords** Contact Centre, demand forecasts, resource planning, communication, scheduling, staffing

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## Overview

This standard is about managing incidents and emergencies in a contact centre. It covers handling incidents and emergencies while taking responsibility for deploying available resources and using appropriate communication systems. It involves following the processes and procedures within the contact centre to react and deal with unforeseen incidents and emergency contacts. It involves contacts in which the person expects or demands the contact centre to be immediately responsive. You will also provide guidance to colleagues on incident and emergency handling and management. It is for contact centre professionals who have some supervisory or managerial responsibility for managing incidents and emergencies in a contact centre.

## Performance criteria

*You must be able to:* **Handle incidents and emergencies through a contact centre following organisational procedures**

1. assess incoming incidents and emergencies to identify organisational procedures that address the contact needs
2. respond to incoming contacts in a professional manner, in accordance with organisational guidelines
3. assess and prioritise reported incidents and emergencies
4. record the contact in a log throughout management of the incident or emergency
5. gather and record information from the contact following organisational procedures
6. hand over the contact information to the members of staff responsible for incident actions
7. respond to requests for information or further incident management actions
8. follow organisational procedures when giving advice to incoming contacts
9. ensure that the legislation and organisational policies are followed to manage the incident reported in the contact centre
10. respond to changing circumstances in an incident and emergency by escalating the response within organisational procedures

**Use communication systems to deploy resources in incident and emergency management**

11. select resources that are immediately available to deal with an incident reported by a contact
12. select a method to communicate and deal with the incident and emergency
13. specify the response needed when communicating and dealing with an incident and emergency
14. follow organisational procedures when communicating with external organisations and agencies regarding an incident and emergency
15. follow agreed and accepted conventions of style and approach when using different communication media during incident management
16. use uniform wording and codes when communicating with those actioning incident management

17. monitor the management of the incident by deployed resources and provide any additional support needed

18. deal with queries or complaints regarding the handling incidents and emergencies

**Provide guidance to colleagues on incident management**

19. identify areas in which colleagues require support and guidance in incident management

20. agree with colleagues and carry out buddying and coaching activities that will provide them with support

21. review the support provided to colleagues handling contacts about incident management

22. use the review of incident management to take actions to improve team performance

23. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and use of technologies

## Manage incidents and emergencies in a contact centre

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### Knowledge and understanding

*You need to know and understand:*

1. the incident and emergency management services offered by the contact centre
2. the commands structure used by emergency services and utility companies
3. the organisational requirements and external regulation or legislation that impact on incident and emergency management
4. the methods of assessing and prioritising incoming contacts for incident and emergency management
5. the organisational procedures for recording information in an incident log
6. how to determine the nature of response to a contact and the appropriate allocation of resources to that response
7. the relevant information for actioning incident and emergency management
8. the range of external organisations and agencies that may be involved
9. the organisational procedures and legislative requirements when giving advice to contacts during incident and emergency management
10. the boundaries of a contact incident that justify actions being escalated to different levels of response
11. how to assess the urgency and priority of an incident and emergency
12. how to identify the resources required to deal with reported incidents
13. the importance of clear communication through the most appropriate channel with members of staff handling the incident and emergency
14. the uniform wording and codes used by the organisation when dealing with incident and emergency management
15. how to maintain control of a conversation
16. the nature and limits of instructions and advice that can be passed on to a contact reporting an incident
17. how to monitor the actions of members of staff dealing with incident and emergency
18. the procedures for dealing with queries and complaints within the limits of your responsibilities

19. how to identify needs and provide support to colleagues to develop their ability to handle incidents and emergencies
20. the importance of reviewing incident management results to improve performance
21. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information and use of technologies

## Manage incidents and emergencies in a contact centre

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<b>Keywords</b>	Contact Centre, incident management, organisational procedures, communication systems, resources deployment, emergency services

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