



|                             |  | Curriculum Document    |                          |  |   |
|-----------------------------|--|------------------------|--------------------------|--|---|
| Curriculum Code             |  | Curriculum Title       |                          | Logo   |   |
| 143905000                   |  | Contact Centre Manager |                          |  |   |
|                             |  | Name                   | Email                    | Phone  | Logo  |
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## **SECTION 1: CURRICULUM SUMMARY**

### **1. Occupational Information**

#### **1.1 Associated Occupation**

143905: Contact Centre Manager

#### **1.2 Occupation or Specialisation Addressed by this Curriculum**

143905000: Contact Centre Manager

#### **1.3 Alternative Titles used by Industry**

- None

### **2. Curriculum Information**

#### **2.1 Curriculum Structure**

This qualification is made up of the following compulsory Knowledge and Practical Skill Modules:

Knowledge Modules:

- 143905000-KM-01, Introductory studies for Contact Centre Managers, NQF Level 4, Credits 4
- 143905000-KM-02, Communication, NQF Level 4, Credits 4
- 143905000-KM-03, Operational Supervision, NQF Level 4, Credits 4
- 143905000-KM-04, Operational Management, NQF Level 5, Credits 4
- 143905000-KM-05, People Management, NQF Level 5, Credits 6
- 143905000-KM-06, Industrial Relations Management, NQF Level 5, Credits 8
- 143905000-KM-07, Contact Centre Technology, Systems and Processes, NQF Level 5, Credits 10
- 143905000-KM-08, Contact Centre Quality Management, NQF Level 5, Credits 10
- 143905000-KM-09, Supplier management, NQF Level 6, Credits 10
- 143905000-KM-10, Customer management, NQF Level 6, Credits 10
- 143905000-KM-11, Financial management concepts, NQF Level 5, Credits 10

Total number of credits for Knowledge Modules: 80

Practical Skill Modules:

- 143905000-PM-01, Provide budgeting services, NQF Level 4, Credits 4
- 143905000-PM-02, Read and interpret financial documents, NQF Level 5, Credits 8
- 143905000-PM-03, Maintain productive and effective work teams, NQF Level 4, Credits 4
- 143905000-PM-04, Develop operational plans and manage performance levels, NQF Level 5, Credits 8

- 143905000-PM-05, Manage service level agreements, NQF Level 6, Credits 8
- 143905000-PM-06, Supervise personnel, NQF Level 4, Credits 6
- 143905000-PM-07, Attend to personnel planning, management and control, NQF Level 5, Credits 8
- 143905000-PM-08, Attend to industrial relations management and control, NQF Level 5, Credits 8
- 143905000-PM-09, Attend to performance and training management and control, NQF Level 5, Credits 4
- 143905000-PM-10, Administer supplier service level agreements, NQF Level 6, Credits 6
- 143905000-PM-11, Attend to customer/client/supplier communication, NQF Level 6, Credits 8
- 143905000-PM-12, Assure the output of the service delivery by agents, NQF Level 6, Credits 8
- 143905000-PM-13, Evaluate MIS reports and ensure system efficiency, NQF Level 5, Credits 6
- 143905000-PM-14, Manage a customer contact process, NQF Level 6, Credits 8
- 143905000-PM-15, Manage process and technology improvement projects, NQF Level 5, Credits 4

Total number of credits for Practical Skill Modules: 98

This qualification also requires the following Work Experience Modules:

- 143905000-WM-01, Attend to standard financial control procedures in a contact centre environment, NQF Level 6, Credits 10
- 143905000-WM-02, Maintain productive and effective work teams for an operational unit in a contact centre, NQF Level 4, Credits 12
- 143905000-WM-03, Attend to operational target- and standard-setting processes in a contact centre environment, NQF Level 5, Credits 13
- 143905000-WM-04, Attend to team leadership and first-line discipline for an operational unit in a contact centre at supervisory level, NQF Level 4, Credits 8
- 143905000-WM-05, Attend to personnel management processes in a contact centre environment within the delegated functions of line management, NQF Level 5, Credits 16
- 143905000-WM-06, Attend to customer and supplier relations management processes in a contact centre environment, NQF Level 6, Credits 16
- 143905000-WM-07, Assure quality standards in a contact centre environment, NQF Level 5, Credits 16
- 143905000-WM-08, Attend to process and technology efficiency management processes in a contact centre environment, NQF Level 5, Credits 16

Total number of credits for Work Experience Modules: 107

## 2.2 Entry Requirements

NQF Level 4 with Mathematics

## 3. Assessment Quality Partner Information

Name of body: Services SETA

Address of body: 15 Sherborne Road, Parktown, Gauteng, 0000

Contact person name: Nozipho Zondo (Manager: QMD: Qualifications and Learning Program Division)

Contact person work telephone number: 011 276 9600

#### **4. Part Qualification Curriculum Structure**

## **SECTION 2: OCCUPATIONAL PROFILE**

### **1. Occupational Purpose**

Contact Centre Managers manage and optimise quality contact centre operations and practices.

### **2. Occupational Tasks**

- Manage and control the costs of a contact centre. (NQF Level 5)
- Manage and control the operational planning and achievement of operational targets. (NQF Level 5)
- Manage personnel employed in a contact centre. (NQF Level 5)
- Manage customer and supplier relations. (NQF Level 5)
- Manage and assure the achievement of contact centre quality standards. (NQF Level 5)
- Manage and control the efficiency of contact centre processes and technology. (NQF Level 5)

### **3. Occupational Task Details**

#### **3.1. Managing and controlling the costs of a contact centre (NQF Level 5)**

##### **Unique Product or Service:**

- Financial targets are met.

##### **Occupational Responsibilities:**

**Information missing**

##### **Occupational Contexts:**

**Information missing**

#### **3.2. Managing and controlling the operational planning and achievement of operational targets (NQF Level 5)**

##### **Unique Product or Service:**

Operational targets and standards are achieved.

##### **Occupational Responsibilities:**

**Information missing**

##### **Occupational Contexts:**

**Information missing**

#### **3.3. Managing personnel employed in a contact centre (NQF Level 5)**

##### **Unique Product or Service:**

People and staffing targets and standards are met.

##### **Occupational Responsibilities:**

**Information missing**

**Occupational Contexts:**

**Information missing**

### **3.4. Managing customer and supplier relations (NQF Level 5)**

**Unique Product or Service:**

- Sound customer and supplier relationships.

**Occupational Responsibilities:**

**Information missing**

**Occupational Contexts:**

**Information missing**

### **3.5. Managing and assuring the achievement of contact centre quality standards (NQF Level 5)**

**Unique Product or Service:**

- Quality standards are assured.

**Occupational Responsibilities:**

**Information missing**

**Occupational Contexts:**

**Information missing**

### **3.6. Managing and controlling the efficiency of contact centre processes and technology (NQF Level 5)**

**Unique Product or Service:**

- Processes and technology efficiency.

**Occupational Responsibilities:**

**Information missing**

**Occupational Contexts:**

**Information missing**

## **SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS**

### **SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS**

List of Knowledge Modules for which Specifications are included

- 143905000-KM-01, Introductory studies for Contact Centre Managers, NQF Level 4, Credits 4
- 143905000-KM-02, Communication, NQF Level 4, Credits 4
- 143905000-KM-03, Operational Supervision, NQF Level 4, Credits 4
- 143905000-KM-04, Operational Management, NQF Level 5, Credits 4
- 143905000-KM-05, People Management, NQF Level 5, Credits 6
- 143905000-KM-06, Industrial Relations Management, NQF Level 5, Credits 8
- 143905000-KM-07, Contact Centre Technology, Systems and Processes, NQF Level 5, Credits 10
- 143905000-KM-08, Contact Centre Quality Management, NQF Level 5, Credits 10
- 143905000-KM-09, Supplier management, NQF Level 6, Credits 10
- 143905000-KM-10, Customer management, NQF Level 6, Credits 10
- 143905000-KM-11, Financial management concepts, NQF Level 5, Credits 10

## **1. 143905000-KM-01: Introductory studies for Contact Centre Managers, NQF Level 4, Credits 4**

### **1.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of contact centre industry, the business environment and concepts of time management, quality and business ethics.

The learning will enable learners to demonstrate an understanding of:

- KM-01-KT01: Contact centre careers and qualifications (10%)
- KM-01-KT02: Contact Centre business environment (40%)
- KM-01-KT03: Safety, Health and Environmental protection (10%)
- KM-01-KT04: Business ethics (40%)

### **1.2 Guidelines for Topics**

#### **1.2.1. KM-01-KT01: Contact centre careers and qualifications (10%)**

***Topic elements to be covered include:***

- KT0101 Career opportunities for a qualified Contact Centre Manager
- KT0102 The skills development landscape
- KT0103 The structure and focus of this qualification
- KT0104 The structure of learning and delivery of the contact centre management qualification
- KT0105 The final assessment and certification of contact centre managers

***Internal Assessment Criteria and Weight***

- IAC0101 The structure and focus of the achievement of the contact centre management qualification is explained
- IAC0102 Career opportunities in the contact centre industry are linked to personal goals and motivated

***(Weight 10%)***

#### **1.2.2. KM-01-KT02: Contact Centre business environment (40%)**

***Topic elements to be covered include:***

- KT0201 Customer value proposition (branding, image)
- KT0202 Role and services rendered
- KT0203 Service delivery strategy
- KT0204 Types of contact centre operations
- KT0205 Back-office business process services in the contact centre environment

- KT0206 Legal requirements for establishing a Contact Centre
- KT0207 Collective employer body, roles and member services
- KT0208 Trade Unions, roles and member services

***Internal Assessment Criteria and Weight***

- IAC0201 Key aspects of the contact centre business environment are described and linked to factors impacting on business success
- IAC0202 Representative bodies are explained in terms of roles and member services
- IAC0203 The diversity of established businesses in the contact centre industry are explained and motivated in terms of specific target markets
- IAC0204 The key elements of a service delivery strategy are explained and contextualised for a specific business type, value proposition and roles and services

***(Weight 40%)***

**1.2.3. KM-01-KT03: Safety, Health and Environmental protection (10%)**

***Topic elements to be covered include:***

- KT0301 Health, Safety and Wellness risks in a contact centre
- KT0302 Green practices in the contact centre environment
- KT0303 The regulated environment of Occupational Health, Safety and Environmental Protection

***Internal Assessment Criteria and Weight***

- IAC0301 Risks and measures to alleviate risks related to health, safety and the environment in the contact centre environment are listed and motivated
- IAC0302 Measures that must be taken by contact centres to ensure compliance are explained
- IAC0303 Measures to protect employees and promote mental and psychological health and wellness are explained and motivated

***(Weight 10%)***

**1.2.4. KM-01-KT04: Business ethics (40%)**

***Topic elements to be covered include:***

- KT0401 Codes of conduct
- KT0402 Values and ethics
- KT0403 Consumer rights and protection
- KT0404 Client services
- KT0405 Supplier relations

- KT0406 Stakeholder responsibilities and expectations

### ***Internal Assessment Criteria and Weight***

- IAC0401 The impact of business ethics is explained and motivated for various key business processes
- IAC0402 Stakeholders' conduct with regards to ensuring ethical business practices are explained and motivated
- IAC0403 Measures to meet regulatory requirements on business ethics are listed
- IAC0404 The ethical focus of relations management as a key business process is explained and motivated
- IAC0405 The key elements of supplier-relations management are explained and motivated as relating to business norms, processes and ethics

***(Weight 40%)***

### **1.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **1.4 Exemptions**

- None recognised

## **2. 143905000-KM-02: Communication, NQF Level 4, Credits 4**

### **2.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the basic communication process and a range of business communication methods.

The learning will enable learners to demonstrate an understanding of:

- KM-02-KT01: Basic principles of communication (20%)
- KM-02-KT02: Formal business communication (60%)
- KM-02-KT03: Non-verbal communication (20%)

### **2.2 Guidelines for Topics**

#### **2.2.1. KM-02-KT01: Basic principles of communication (20%)**

***Topic elements to be covered include:***

- KT0101 Principles of effective communication
- KT0102 The communication process
- KT0103 Listening skills
- KT0104 Barriers to effective interpersonal interaction (Perceptions, Cultural Diversity, Semantic Barriers)

#### ***Internal Assessment Criteria and Weight***

- IAC0101 Communication principles are understood and explained in relation to effective communication
- IAC0102 Good communication principles are motivated with reference to different scenarios

***(Weight 20%)***

#### **2.2.2. KM-02-KT02: Formal business communication (60%)**

***Topic elements to be covered include:***

- KT0201 Reports
- KT0202 Electronic communication
- KT0203 Meetings and meeting procedures
- KT0204 Presentations
- KT0205 Business letters and notices
- KT0206 Telephonic communication
- KT0207 Facilitation
- KT0208 Conflict resolution

- KT0209 Negotiations
- KT0210 Dissemination of information

***Internal Assessment Criteria and Weight***

- IAC0201 Formal business communication is drafted for a range of scenarios
- IAC0202 Communication practices that ensures efficient business communication are listed and motivated for a range or written applications
- IAC0203 The principles of conflict resolution and conflict resolution styles are explained
- IAC0204 Practices that ensures effective and efficient meetings are explained
- IAC0205 Data is organised and captured as a presentation for meetings
- IAC0206 Effective telephone answering and communication practices are explained
- IAC0207 The principles of negotiations and negotiation styles are explained
- IAC0208 Formal notices aimed at dissemination of information are drafted

***(Weight 60%)***

**2.2.3. KM-02-KT03: Non-verbal communication (20%)**

***Topic elements to be covered include:***

- KT0301 Body language
- KT0302 Facial expressions
- KT0303 Voice control
- KT0304 Dress code

***Internal Assessment Criteria and Weight***

- IAC0301 Non-verbal communication principles and practices are explained for different modes of communication

***(Weight 20%)***

**2.3 Provider Programme Accreditation Criteria**

***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

***Human Resource Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

***Legal Requirements:***

- Compliance with occupational health, safety and environmental protection regulations.

#### **2.4 Exemptions**

- None recognised

### **3. 143905000-KM-03: Operational Supervision, NQF Level 4, Credits 4**

#### **3.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of general supervisory concepts.

The learning will enable learners to demonstrate an understanding of:

- KM-03-KT01: Introduction to supervision (20%)
- KM-03-KT02: Supervising teams (20%)
- KM-03-KT03: Performance Management (20%)
- KM-03-KT04: Industrial Relations (20%)
- KM-03-KT05: Workplace health and safety legislation (10%)
- KM-03-KT06: General rules and principles of safe work practices (10%)
- KM-03-KT07: Quality assurance in the contact centre environment (20%)

#### **3.2 Guidelines for Topics**

##### **3.2.1. KM-03-KT01: Introduction to supervision (20%)**

***Topic elements to be covered include:***

- KT0101 The supervisory function
- KT0102 Business structures and levels of management
- KT0103 Supervision and organisational performance

***Internal Assessment Criteria and Weight***

- IAC0101 Supervisory theories, concepts and models are explained
- IAC0102 The role of the supervisor as a management team member is explained

***(Weight 20%)***

##### **3.2.2. KM-03-KT02: Supervising teams (20%)**

***Topic elements to be covered include:***

- KT0201 Productive work teams
- KT0202 Stages in development
- KT0203 Leadership, decision making and problem solving in groups
- KT0204 Delegation

***Internal Assessment Criteria and Weight***

- IAC0201 The role of the supervisor to establish productive work teams is explained

- IAC0202 Leadership and decision-making models that are used to build teams are explained
- IAC0203 Achieving work targets through delegation is explained

**(Weight 20%)**

### **3.2.3. KM-03-KT03: Performance Management (20%)**

**Topic elements to be covered include:**

- KT0301 An overview of performance management concepts and principles
- KT0302 Performance targets
- KT0303 Performance interviews and agreements

**Internal Assessment Criteria and Weight**

- IAC0301 Performance management concepts and principles are explained
- IAC0302 An understanding of performance target setting is demonstrated

**(Weight 20%)**

### **3.2.4. KM-03-KT04: Industrial Relations (20%)**

**Topic elements to be covered include:**

- KT0401 The regulatory environment
- KT0402 Maintaining workplace discipline
- KT0403 Attending to grievances
- KT0404 Conflict resolution

**Internal Assessment Criteria and Weight**

- IAC0401 Key regulatory provisions that guide the management of workplace discipline are explained
- IAC0402 The role of the supervisor in maintaining a disciplined workforce is explained
- IAC0403 Grievance resolution procedures, principles and practices are explained
- IAC0404 Conflict resolution principles and practices are explained

**(Weight 20%)**

### **3.2.5. KM-03-KT05: Workplace health and safety legislation (10%)**

**Topic elements to be covered include:**

- KT0501 Occupational health, safety and environmental control legislation
- KT0502 Employee health and wellness in the contact centre environment

- KT0503 General safety rules for workplaces

***Internal Assessment Criteria and Weight***

- IAC0501 The statutory provisions for assuring a safe workplace are explained
- IAC0502 Factors impacting on employee health and wellness in a contact centre environment are explained and measures to address these are listed

***(Weight 10%)***

**3.2.6. KM-03-KT06: General rules and principles of safe work practices (10%)**

***Topic elements to be covered include:***

- KT0601 Good housekeeping practices and risks
- KT0602 Personal protective equipment
- KT0603 Safety signs and colour coding
- KT0604 Rules related to specific procedures and risks, including emergencies, restricted entrance, fire prevention, and injuries on duty
- KT0605 Universal precautions when attending to injured persons
- KT0606 Provisions related to intoxication, unauthorised use of motorised or mobile equipment

***Internal Assessment Criteria and Weight***

- IAC0601 Respond to a range of questions that will demonstrate an understanding of the general rules and principles of safe work practices

***(Weight 10%)***

**3.2.7. KM-03-KT07: Quality assurance in the contact centre environment (20%)**

***Topic elements to be covered include:***

- KT0701 SABS Standard (BPS&O standard) overview
- KT0702 Service level agreements
- KT0703 Management information systems
- KT0704 Service satisfaction surveys

***Internal Assessment Criteria and Weight***

- IAC0701 A broad outline of the SABS standard is provided and the role of the supervisor is described
- IAC0702 The use of services level agreements to define standards of delivery are explained
- IAC0703 The use of management information systems to monitor quality standards is explained
- IAC0704 The use of satisfaction surveys to monitor quality standards are explained

**(Weight 20%)**

### **3.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **3.4 Exemptions**

- None recognised

## **4. 143905000-KM-04: Operational Management, NQF Level 5, Credits 4**

### **4.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of management principles and concepts that commonly apply to the management of an operation.

The learning will enable learners to demonstrate an understanding of:

- KM-04-KT01: Introduction to management (20%)
- KM-04-KT02: Operational planning (20%)
- KM-04-KT03: Organising (20%)
- KM-04-KT04: Leading (20%)
- KM-04-KT05: Controlling (20%)

### **4.2 Guidelines for Topics**

#### **4.2.1. KM-04-KT01: Introduction to management (20%)**

***Topic elements to be covered include:***

- KT0101 The scope of management
- KT0102 Management theory
- KT0103 Leadership
- KT0104 Strategic business management models
- KT0105 Management in a changing environment

***Internal Assessment Criteria and Weight***

- IAC0101 Management theories, concepts and models are explained and the impact on management practices are motivated

***(Weight 20%)***

#### **4.2.2. KM-04-KT02: Operational planning (20%)**

***Topic elements to be covered include:***

- KT0201 An overview of planning concepts and principles
- KT0202 Strategic planning
- KT0203 Operational targets and scheduling
- KT0204 Problem solving

***Internal Assessment Criteria and Weight***

- IAC0201 An understanding of operational planning concepts and principles are demonstrated by planning and scheduling the delivery of operational targets

- IAC0202 Strategic planning concepts and the integration with operational planning are explained

**(Weight 20%)**

#### **4.2.3. KM-04-KT03: Organising (20%)**

**Topic elements to be covered include:**

- KT0301 An overview of organising concepts and principles
- KT0302 Organising, delegating and authority
- KT0303 Structuring and organising work
- KT0304 Empowerment

**Internal Assessment Criteria and Weight**

- IAC0301 The role of managers in organising the delivery of work is explained and good practices are motivated

**(Weight 20%)**

#### **4.2.4. KM-04-KT04: Leading (20%)**

**Topic elements to be covered include:**

- KT0401 An overview of concepts and principles related to leading teams
- KT0402 Leadership as a management function
- KT0403 Leadership models
- KT0404 Motivation
- KT0405 Leading individuals
- KT0406 Leading groups and teams

**Internal Assessment Criteria and Weight**

- IAC0401 Leadership and management roles and their applications in to day-to-day practices are explained
- IAC0402 The leadership roles of managers in organisations are explained and good practices are motivated for different groups or work processes

**(Weight 20%)**

#### **4.2.5. KM-04-KT05: Controlling (20%)**

**Topic elements to be covered include:**

- KT0501 An overview of concepts and principles related to controlling

- KT0502 The control process
- KT0503 The focus of control
- KT0504 Areas of control
- KT0505 Levels of control

***Internal Assessment Criteria and Weight***

- IAC0501 The role of managers in controlling the delivery of work is explained and good practices are motivated

***(Weight 20%)***

**4.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

**4.4 Exemptions**

- None recognised

## **5. 143905000-KM-05: People Management, NQF Level 5, Credits 6**

### **5.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the personnel management functions attended to by line management.

The learning will enable learners to demonstrate an understanding of:

- KM-05-KT01: Recruitment and selection (25%)
- KM-05-KT02: Performance management (25%)
- KM-05-KT03: Training management (25%)
- KM-05-KT04: Facilitation, coaching and mentoring (25%)

### **5.2 Guidelines for Topics**

#### **5.2.1. KM-05-KT01: Recruitment and selection (25%)**

***Topic elements to be covered include:***

- KT0101 The recruitment process
- KT0102 The recruitment interview
- KT0103 The selection process
- KT0104 Recruitment agencies

***Internal Assessment Criteria and Weight***

- IAC0101 Factors that impact on an effective recruitment and selection process are listed and motivated
- IAC0102 Recruitment criteria and standard candidate evaluation questions are formulated

***(Weight 25%)***

#### **5.2.2. KM-05-KT02: Performance management (25%)**

***Topic elements to be covered include:***

- KT0201 Key performance areas and job descriptions
- KT0202 The performance management process
- KT0203 Factors affecting performance levels
- KT0204 Performance agreements and targets
- KT0205 Performance interviews

***Internal Assessment Criteria and Weight***

- IAC0201 Factors that impact on an effective performance management process are listed and motivated

- IAC0202 Variables in the work environment that impact on the performance of an individual are listed and corrective measures are motivated
- IAC0203 Job descriptions that outline key deliverables and performance targets are drafted
- IAC0204 Principles that guide inter-personal relations during performance interviews and the establishment of performance agreements are explained

**(Weight 25%)**

### **5.2.3. KM-05-KT03: Training management (25%)**

**Topic elements to be covered include:**

- KT0301 The skills development landscape
- KT0302 Training needs and plan
- KT0303 Skills delivery (selecting providers, informing trainers and facilitators)
- KT0304 Measurement of the training impact
- KT0305 Career planning

**Internal Assessment Criteria and Weight**

- IAC0301 Factors that impact on an effective training management process are listed and motivated
- IAC0302 Training needs analysis processes are described and the application thereof explained
- IAC0303 An evaluation schedule for the selection of skills development providers is drafted and different components are motivated
- IAC0304 Basic principles of career planning are explained from a business process perspective

**(Weight 25%)**

### **5.2.4. KM-05-KT04: Facilitation, coaching and mentoring (25%)**

**Topic elements to be covered include:**

- KT0401 Adult learning principles
- KT0402 Learning methodology
- KT0403 Material relevance
- KT0404 Impact assessment and measurement of skills transfer
- KT0405 Coaching and mentoring

**Internal Assessment Criteria and Weight**

- IAC0401 Adult learning principles and learning methodology concepts are explained
- IAC0402 Material evaluation criteria are listed and motivated

- IAC0403 Criteria that must be met to ensure that the required impact of a programme is achieved and that the required skills have been transferred are listed and explained
- IAC0404 Coaching and mentoring principles are described and the application of both explained

**(Weight 25%)**

### **5.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **5.4 Exemptions**

- None recognised

## **6. 143905000-KM-06: Industrial Relations Management, NQF Level 5, Credits 8**

### **6.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the industrial relations management functions attended to by line management.

The learning will enable learners to demonstrate an understanding of:

- KM-06-KT01: Overview of relevant legislation (15%)
- KM-06-KT02: The employment relationship and contract of employment (10%)
- KM-06-KT03: Conduct management (30%)
- KM-06-KT04: Capacity management (20%)
- KM-06-KT05: Conflict management (15%)
- KM-06-KT06: Dispute Resolution (10%)

### **6.2 Guidelines for Topics**

#### **6.2.1. KM-06-KT01: Overview of relevant legislation (15%)**

***Topic elements to be covered include:***

- KT0101 The Constitution of SA
- KT0102 The LR Act
- KT0103 The EE Act
- KT0104 The BCE Act

***Internal Assessment Criteria and Weight***

- IAC0101 The regulatory framework of legislation is explained in broad general terms

***(Weight 15%)***

#### **6.2.2. KM-06-KT02: The employment relationship and contract of employment (10%)**

***Topic elements to be covered include:***

- KT0201 The nature of the relationship
- KT0202 Contracts of employment
- KT0203 Freedom of association
- KT0204 Collective agreements

***Internal Assessment Criteria and Weight***

- IAC0201 The establishment and the nature of the employment relationship are explained
- IAC0202 Principles that protects the freedom of association concept are explained

- IAC0203 The establishment, standing or enforceability of a collective agreement are explained

**(Weight 10%)**

### **6.2.3. KM-06-KT03: Conduct management (30%)**

**Topic elements to be covered include:**

- KT0301 Codes of conduct
- KT0302 Procedural fairness
- KT0303 Substantive fairness
- KT0304 Principles established through cases and awards

**Internal Assessment Criteria and Weight**

- IAC0301 Misconduct is classified or ranked in terms of seriousness, disciplinary procedures and possible remedial action
- IAC0302 The requirements of procedural fairness and possible consequences if not adhered to are explained
- IAC0303 The requirements of substantive fairness and possible consequences if not adhered to are explained

**(Weight 30%)**

### **6.2.4. KM-06-KT04: Capacity management (20%)**

**Topic elements to be covered include:**

- KT0401 Types of capacity-related problems
- KT0402 Guiding principles for dealing with capacity-related problems
- KT0403 Principles established through cases and awards

**Internal Assessment Criteria and Weight**

- IAC0401 Capacity-related problems are grouped in different categories and associated remedial actions
- IAC0402 Principles and measures that must be complied with when addressing capacity related problems are explained

**(Weight 20%)**

### **6.2.5. KM-06-KT05: Conflict management (15%)**

**Topic elements to be covered include:**

- KT0501 Principles of conflict management

- KT0502 Grievances and grievance procedures
- KT0503 Collective disputes

***Internal Assessment Criteria and Weight***

- IAC0501 Principles of conflict management are explained
- IAC0502 Grievances are grouped in different categories and associated grievances procedure explained
- IAC0503 Effective dispute resolution practices are explained

***(Weight 15%)***

**6.2.6. KM-06-KT06: Dispute Resolution (10%)**

***Topic elements to be covered include:***

- KT0601 Dispute resolution bodies and jurisdiction
- KT0602 Introduction to the CCMA and CCMA procedures
- KT0603 Conciliation
- KT0604 Mediation
- KT0605 Arbitration

***Internal Assessment Criteria and Weight***

- IAC0601 The CCMA role and procedures are explained for different disputes
- IAC0602 Conciliation principles and procedures are explained
- IAC0603 Mediation principles and procedures are explained
- IAC0604 Arbitration principles and procedures are explained

***(Weight 10%)***

**6.3 Provider Programme Accreditation Criteria**

***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

***Human Resource Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

***Legal Requirements:***

- Compliance with occupational health, safety and environmental protection regulations.

## 6.4 Exemptions

- None recognised

## **7. 143905000-KM-07: Contact Centre Technology, Systems and Processes, NQF Level 5, Credits 10**

### **7.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the technology used in a contact centre as well as the associated systems.

The learning will enable learners to demonstrate an understanding of:

- KM-07-KT01: Types of technology/systems and the application thereof (30%)
- KM-07-KT02: Process flow and control (70%)

### **7.2 Guidelines for Topics**

#### **7.2.1. KM-07-KT01: Types of technology/systems and the application thereof (30%)**

***Topic elements to be covered include:***

- KT0101 Interactive voice response
- KT0102 Predictive dialler
- KT0103 Telephony
- KT0104 Quality management
- KT0105 Call recording
- KT0106 Workforce management
- KT0107 Customer management
- KT0108 Multi-media

***Internal Assessment Criteria and Weight***

- IAC0101 The requirements of technology to effectively meet specific customer expectations and business objectives are understood
- IAC0102 Appropriate technology for a range of interests is identified
- IAC0103 The application and output of technology are described and motivated
- IAC0104 Measures that must be controlled to ensure optimal utilisation of technology are described and motivated

***(Weight 30%)***

#### **7.2.2. KM-07-KT02: Process flow and control (70%)**

***Topic elements to be covered include:***

- KT0201 Process flow diagrams and interpretation
- KT0202 Testing technology functionality

- KT0203 Defining technology requirements for different users
- KT0204 Risk management
- KT0205 System reports
- KT0206 System constraints

***Internal Assessment Criteria and Weight***

- IAC0201 A process flow diagram that illustrates the application of technology for different business requirements is interpreted and explained
- IAC0202 Risk points and functionality tests for a specific technology depicted on a process flow diagram is identified and explained
- IAC0203 System reports are analysed, corrective measures motivated and a communication flow drawn up
- IAC0204 Constraints of specific technology in a specified customer service environment are listed and remedial action is explained

***(Weight 70%)***

**7.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

**7.4 Exemptions**

- None recognised

## **8. 143905000-KM-08: Contact Centre Quality Management, NQF Level 5, Credits 10**

### **8.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of the quality management systems in the contact centre environment.

The learning will enable learners to demonstrate an understanding of:

- KM-08-KT01: SABS Standard (BPS&O standard) and Benchmarking (70%)
- KM-08-KT02: ISO Customer Contact Centre ISO standard (30%)

### **8.2 Guidelines for Topics**

#### **8.2.1. KM-08-KT01: SABS Standard (BPS&O standard) and Benchmarking (70%)**

***Topic elements to be covered include:***

- KT0101 Introductory overview
- KT0102 Benchmarking concepts and principles
- KT0103 Leadership and customer service management practices
- KT0104 Human resources management practices
- KT0105 Operational management practices
- KT0106 Technical resource management

***Internal Assessment Criteria and Weight***

- IAC0101 The scope, purpose and structure of the BPS&O SABS Standard is summarised
- IAC0102 Conformance requirements for specific standards are listed as an open book assessment
- IAC0103 The benchmarking process is described for specific quality evaluation outputs
- IAC0104 The benchmarking case studies are analysed, interpreted and remedial actions are listed
- IAC0105 Benchmarking practices and auditing procedures for compliance certification are explained

***(Weight 70%)***

#### **8.2.2. KM-08-KT02: ISO Customer Contact Centre ISO standard (30%)**

***Topic elements to be covered include:***

- KT0201 Introductory overview of ISO developments
- KT0202 Agreed scope of the ISO standard
- KT0203 Front-end (inbound, outbound) standards
- KT0204 Requirements for customer contact centres
- KT0205 Compliance standards for clients using contracted outsourced services

### ***Internal Assessment Criteria and Weight***

- IAC0201 The scope, purpose and structure of the ISO Standard is summarised

***(Weight 30%)***

### **8.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **8.4 Exemptions**

- None recognised

## **9. 143905000-KM-09: Supplier management, NQF Level 6, Credits 10**

### **9.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of supplier management and related service level agreements.

The learning will enable learners to demonstrate an understanding of:

- KM-09-KT01: Supplier selection (50%)
- KM-09-KT02: Service Level Agreements (50%)

### **9.2 Guidelines for Topics**

#### **9.2.1. KM-09-KT01: Supplier selection (50%)**

***Topic elements to be covered include:***

- KT0101 Business needs analysis and requirements
- KT0102 Defining terms of reference
- KT0103 Sourcing suppliers
- KT0104 Procurement and contracting process

***Internal Assessment Criteria and Weight***

- IAC0101 Business needs analysis processes are explained in relation to the establishment of business requirements
- IAC0102 The importance of clear and manageable terms of reference is motivated
- IAC0103 Criteria for sourcing suppliers are listed and the importance of specific national priorities are reflected in selection criteria defined
- IAC0104 The requirements and accountability of officers to ensure a transparent and ethical procurement process are explained

***(Weight 50%)***

#### **9.2.2. KM-09-KT02: Service Level Agreements (50%)**

***Topic elements to be covered include:***

- KT0201 Introduction to and application of service level agreements
- KT0202 Structure and scope of a service level agreement
- KT0203 Stakeholder expectation management through SLAs
- KT0204 Legal position regarding service level agreements
- KT0205 Relations management through SLAs

***Internal Assessment Criteria and Weight***

- IAC0201 The use of service level agreements to manage stakeholder expectations and relations is explained
- IAC0202 The structure, scope and application of SLAs in the Contact Centre industry are explained
- IAC0203 SLAs management practices are explained and motivated

**(Weight 50%)**

### **9.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **9.4 Exemptions**

- None recognised

## **10. 143905000-KM-10: Customer management, NQF Level 6, Credits 10**

### **10.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of customer management concepts in the contact centre environment.

The learning will enable learners to demonstrate an understanding of:

- KM-10-KT01: Customer process management (80%)
- KM-10-KT02: Customer Service Level Agreements/Terms & Conditions (20%)

### **10.2 Guidelines for Topics**

#### **10.2.1. KM-10-KT01: Customer process management (80%)**

***Topic elements to be covered include:***

- KT0101 Customer contact strategy
- KT0102 Relationship between business-, marketing targets and contact centre service delivery
- KT0103 Customer lifecycle management
- KT0104 Customer segmentation
- KT0105 Customer routing and channels
- KT0106 Customer process management
- KT0107 Customer retention
- KT0108 Customer complaints management and escalations

***Internal Assessment Criteria and Weight***

- IAC0101 Elements of a customer management process are explained
- IAC0102 Interdependencies between elements of customer management processes are identified and motivated
- IAC0103 Risk of not adhering to customer management processes are explained for specific scenarios
- IAC0104 Business benefits of the implementation of a successful customer management process are explained
- IAC0105 Management controls that have to be implemented to ensure an effective customer process management system are defined and motivated

***(Weight 80%)***

#### **10.2.2. KM-10-KT02: Customer Service Level Agreements/Terms & Conditions (20%)**

***Topic elements to be covered include:***

- KT0201 Introduction to and application of service level agreements

- KT0202 Structure and scope of a service level agreement
- KT0203 Relations management through SLAs
- KT0204 Stakeholder expectation management through SLAs
- KT0205 Legal compliance and recourse
- KT0206 Indemnity insurance

***Internal Assessment Criteria and Weight***

- IAC0201 The interpretation and application of SLAs in the customer services context are defined
- IAC0202 The use of service level agreements to manage regulatory liabilities and compliance is defined
- IAC0203 The business risks and related consequences of non-compliance with terms and condition of a SLA are explained for specific scenarios

***(Weight 20%)***

**10.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

**10.4 Exemptions**

- None recognised

## **11. 143905000-KM-11: Financial management concepts, NQF Level 5, Credits 10**

### **11.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge module is to build an understanding of financial concepts as related to operational managers.

The learning will enable learners to demonstrate an understanding of:

- KM-11-KT01: Introduction to financial concepts (40%)
- KM-11-KT02: Costs and management accounting (60%)

### **11.2 Guidelines for Topics**

#### **11.2.1. KM-11-KT01: Introduction to financial concepts (40%)**

***Topic elements to be covered include:***

- KT0101 Basic accounting principles
- KT0102 Budgets and budgeting
- KT0103 Financial statements
- KT0104 Financial source documents
- KT0105 Auditing concepts

***Internal Assessment Criteria and Weight***

- IAC0101 Elements of the accounting process are explained
- IAC0102 An understanding of budgets and budgeting concepts is demonstrated
- IAC0103 An understanding of financial statements and cost management concepts is demonstrated
- IAC0104 An understanding of the control and use of financial source documents is demonstrated
- IAC0105 Management controls that have to be implemented to ensure an effective financial management system are defined and motivated

***(Weight 40%)***

#### **11.2.2. KM-11-KT02: Costs and management accounting (60%)**

***Topic elements to be covered include:***

- KT0201 Costing and cost estimates
- KT0202 Cost control
- KT0203 Management accounting systems
- KT0204 Financial risks management concepts

***Internal Assessment Criteria and Weight***

- IAC0201 An understanding of costing of services is demonstrated

- IAC0202 The use of management information systems in controlling costs is explained
- IAC0203 The business risks and related consequences of non-compliance with budgets and cost estimates are explained for specific scenarios

**(Weight 60%)**

### **11.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **11.4 Exemptions**

- None recognised

## SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS

### List of Practical Skill Module Specifications

- 143905000-PM-01, Provide budgeting services, NQF Level 4, Credits 4
- 143905000-PM-02, Read and interpret financial documents, NQF Level 5, Credits 8
- 143905000-PM-03, Maintain productive and effective work teams, NQF Level 4, Credits 4
- 143905000-PM-04, Develop operational plans and manage performance levels, NQF Level 5, Credits 8
- 143905000-PM-05, Manage service level agreements, NQF Level 6, Credits 8
- 143905000-PM-06, Supervise personnel, NQF Level 4, Credits 6
- 143905000-PM-07, Attend to personnel planning, management and control, NQF Level 5, Credits 8
- 143905000-PM-08, Attend to industrial relations management and control, NQF Level 5, Credits 8
- 143905000-PM-09, Attend to performance and training management and control, NQF Level 5, Credits 4
- 143905000-PM-10, Administer supplier service level agreements, NQF Level 6, Credits 6
- 143905000-PM-11, Attend to customer/client/supplier communication, NQF Level 6, Credits 8
- 143905000-PM-12, Assure the output of the service delivery by agents, NQF Level 6, Credits 8
- 143905000-PM-13, Evaluate MIS reports and ensure system efficiency, NQF Level 5, Credits 6
- 143905000-PM-14, Manage a customer contact process, NQF Level 6, Credits 8
- 143905000-PM-15, Manage process and technology improvement projects, NQF Level 5, Credits 4

## **1. 143905000-PM-01: Provide budgeting services, NQF Level 4, Credits 4**

### **1.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain practical skills in a controlled learning environment related to the development of operational budgets for a contact centre that are aligned to the achievement of operational plans.

The learner will be required to:

- PM-01-PS01: Provide inputs into the budgeting process
- PM-01-PS02: Draw up an annual operational budget

### **1.2 Guidelines for Practical Skills**

#### **1.2.1. PM-01-PS01: Provide inputs into the budgeting process**

##### ***Scope of Practical Skill***

Given a simulated exercise and financial documents the learner must be able to:

- PA0101 Review past budget trends
- PA0102 Establish budget requirements
- PA0103 Compile inputs for the budgeting process

##### ***Applied Knowledge***

- AK0101 Budgeting concepts

##### ***Internal Assessment Criteria***

- IAC0101 Budget inputs are comprehensive and accurate
- IAC0102 Budgeting is done in a structured and organised manner

#### **1.2.2. PM-01-PS02: Draw up an annual operational budget**

##### ***Scope of Practical Skill***

Given a simulated exercise and financial documents the learner must be able to:

- PA0201 Review past budgets and expenses
- PA0202 Evaluate and cost business targets
- PA0203 Draw up a budget that supports operational targets
- PA0204 Motivate budget items for inclusion

##### ***Applied Knowledge***

- AK0201 Budgeting concepts

##### ***Internal Assessment Criteria***

- IAC0201 Budgets are comprehensive and accurate

### **1.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **1.4 Exemptions**

- None recognised

## **2. 143905000-PM-02: Read and interpret financial documents, NQF Level 5, Credits 8**

### **2.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain practical skills in a controlled learning environment related to planning, monitoring and control finances of a contact centre as related to the functions of line management.

The learner will be required to:

- PM-02-PS01: Monitor, control and report on expense against budgets
- PM-02-PS02: Read financial statements and explain variables

### **2.2 Guidelines for Practical Skills**

#### **2.2.1. PM-02-PS01: Monitor, control and report on expense against budgets**

##### ***Scope of Practical Skill***

Given a simulated exercise with examples of budgets, source documents, workforce and operational plans, the learner must be able to:

- PA0101 Analyses budget against operational and workforce projections
- PA0102 Control procurement against budgets by comparing source documents to budget items
- PA0103 Compare actual against planned expenses
- PA0104 Forecast expenditure to meet targets set in the workforce and operational plans
- PA0105 Determine risks of not meeting the budget
- PA0106 Formulate measure to minimize risks
- PA0107 Formulate corrective actions
- PA0108 Report on financial trends
- PA0109 Formulate cost reduction opportunities

##### ***Applied Knowledge***

- AK0101 Budget analysis
- AK0102 Cost forecasts
- AK0103 Financial risks

##### ***Internal Assessment Criteria***

- IAC0101 The budgets are accurately analysed and variances identified against workforce and operational plans
- IAC0102 Costs of consumable items purchased are verified against source documents
- IAC0103 Expenditure forecasts are executed against defined unit costs and aligned to the operational and workforce plans

- IAC0104 The potential risks related to realising budget projections are listed and measures to address these motivated
- IAC0105 Responses to different emergency scenarios, risks and problems are explained
- IAC0106 Reports on budget trends are accurate and comprehensive

### **2.2.2. PM-02-PS02: Read financial statements and explain variables**

#### ***Scope of Practical Skill***

Given a simulated exercise with a range of financial statements such as income, expenses, balance sheet, the learner must be able to:

- PA0201 Read and interpret the financial statements
- PA0202 Isolate variances
- PA0203 Explain variances and formulate corrective measures
- PA0204 Recognise and explain trends

#### ***Applied Knowledge***

- AK0201 Financial statements
- AK0202 Ratios

#### ***Internal Assessment Criteria***

- IAC0201 An understanding of the impact of management decisions on financial results is demonstrated
- IAC0202 Statements are accurately analysed, key trends are recognised and measures to address these formulated

### **2.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### ***Human Resource Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### ***Legal Requirements:***

- Compliance with occupational health, safety and environmental protection regulations.

### **2.4 Exemptions**

- None recognised

### **3. 143905000-PM-03: Maintain productive and effective work teams, NQF Level 4, Credits 4**

#### **3.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain the practical skills to establish productive work teams that meet operational targets and quality standards.

The learner will be required to:

- PM-03-PS01: Set production targets for work teams
- PM-03-PS02: Evaluate team outputs and quality standards

#### **3.2 Guidelines for Practical Skills**

##### **3.2.1. PM-03-PS01: Set production targets for work teams**

###### ***Scope of Practical Skill***

Given a range of simulated learning exercise, a workforce plan and operational targets, the learner must be able to:

- PA0101 Analyse the workforce plan and operational targets
- PA0102 List the operational deliverables and standards that must be met by the work team
- PA0103 Formulate measurable targets for the team members
- PA0104 Conduct a team meeting and confirm targets and quality standards that must be met

###### ***Applied Knowledge***

- AK0101 Performance goals
- AK0102 Inter-personal relations

###### ***Internal Assessment Criteria***

- IAC0101 Team targets are set that meet the outputs defined in the workforce plan and the operational targets

##### **3.2.2. PM-03-PS02: Evaluate team outputs and quality standards**

###### ***Scope of Practical Skill***

Given a range of simulated learning exercise, the learner must be able to:

- PA0201 Use Management Information System reports to determine team outputs
- PA0202 Compare outputs against targets
- PA0203 Identify areas of non-compliance
- PA0204 Formulate measures to address areas of non-compliance

###### ***Applied Knowledge***

- AK0201 Management information reports

### ***Internal Assessment Criteria***

- IAC0201 Information contained in the Management Information System report is accurately analysed and targets are compared to set deliverables
- IAC0202 Areas of non-performance are identified and corrective measures formulated that are practicable and implementable

### **3.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **3.4 Exemptions**

- None recognised

## **4. 143905000-PM-04: Develop operational plans and manage performance levels, NQF Level 5, Credits 8**

### **4.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain the practical skills related to the development of operational plans and management of the operational performance levels of a contact centre.

The learner will be required to:

- PM-04-PS01: Develop an annual operational plan
- PM-04-PS02: Monitor and report on performance levels

### **4.2 Guidelines for Practical Skills**

#### **4.2.1. PM-04-PS01: Develop an annual operational plan**

##### ***Scope of Practical Skill***

Given a controlled simulated learning environment, service level agreements and business targets, the learner must be able to:

- PA0101 Define operational objectives
- PA0102 List annual operational items that must be achieved
- PA0103 Estimate monthly and annual targets
- PA0104 Evaluate past delivery trends for specific items
- PA0105 Formulate achievable targets based on past trends
- PA0106 Define operational targets for each of the objectives
- PA0107 Estimate resources requirements for each of the targets
- PA0108 Estimate technology requirements for each of the objectives
- PA0109 Define risks for each operational objective
- PA0110 Develop a risk management plan
- PA0111 Formulate measures that will have to be implemented to achieve increased target levels

##### ***Applied Knowledge***

- AK0101 Production planning

##### ***Internal Assessment Criteria***

- IAC0101 Operational objectives and targets are defined and aligned to the service level agreements and the business targets
- IAC0102 The risk management plan to address deviations from planned targets is explained and motivated
- IAC0103 Operational targets are defined and aligned to targets contained in the service level agreements and the business targets

- IAC0104 Measures to address deviations from planned targets are explained and motivated

#### **4.2.2. PM-04-PS02: Monitor and report on performance levels**

##### ***Scope of Practical Skill***

Given a controlled simulated learning environment, operational reports, service level agreements and business targets, the learner must be able to:

- PA0201 Review short-term and quarterly targets and project revised target levels
- PA0202 Analyse agent performance records and develop a performance report
- PA0203 Align operational targets and financial costs
- PA0204 Collate the reports into a central management plan
- PA0205 Prepare a presentation on key findings, proposed actions and target levels

##### ***Applied Knowledge***

- AK0201 Operational planning

##### ***Internal Assessment Criteria***

- IAC0201 Operational objectives and targets are defined and aligned to the service level agreements and the business targets

#### **4.3 Provider Programme Accreditation Criteria**

##### ***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

##### ***Human Resource Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

##### ***Legal Requirements:***

- Compliance with occupational health, safety and environmental protection regulations.

#### **4.4 Exemptions**

- None recognised

## **5. 143905000-PM-05: Manage service level agreements, NQF Level 6, Credits 8**

### **5.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain the practical skills to the management of service level agreements.

The learner will be required to:

- PM-05-PS01: Read and interpret a service level agreement
- PM-05-PS02: Define service delivery requirements

### **5.2 Guidelines for Practical Skills**

#### **5.2.1. PM-05-PS01: Read and interpret a service level agreement**

##### ***Scope of Practical Skill***

Given a range of different service level agreements, the learner must be able to:

- PA0101 Identify the specific deliverables related to the terms and conditions
- PA0102 List the operational requirements to meet SLA deliverables
- PA0103 Align the deliverable with current operational processes and targets
- PA0104 Identify potential operational risks related to meeting the SLA requirements
- PA0105 Develop an operational plan to ensure the achievement of the SLA requirements
- PA0106 Develop a control procedure to manage the SLA

##### ***Applied Knowledge***

- AK0101 Interpretation of an SLA
- AK0102 Operational risks
- AK0103 Legal compliance
- AK0104 Operational control procedures

##### ***Internal Assessment Criteria***

- IAC0101 The interpretation of deliverables is accurate and comprehensive
- IAC0102 Deliverables are defined in terms of specific targets and aligned with operational processes
- IAC0103 Potential risks are defined and related management processes explained
- IAC0104 Procedures are implementable, practicable and cost effective

#### **5.2.2. PM-05-PS02: Define service delivery requirements**

##### ***Scope of Practical Skill***

Given a range of service level agreements, performance reports and operational objectives, the learner must be able to:

- PA0201 List specific actions and processes that must be delivered by the contact centre to meet the SLA objectives
- PA0202 Evaluate the current performance levels in relation to the achievement of the SLA deliverables
- PA0203 Recognise potential problem areas and formulate recommendations to amend current processes

#### ***Applied Knowledge***

- AK0201 Defining SLA deliverables
- AK0202 Evaluation techniques
- AK0203 Performance metrics
- AK0204 Problem solving and continuous improvement

#### ***Internal Assessment Criteria***

- IAC0201 Operational requirements to meet the SLA are evident in the operational plan
- IAC0202 Performance matrix to be achieved is included in the operational plan
- IAC0203 Service delivery gaps are accurately defined, and practicable, cost effective recommendations are documented to address these

### **5.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **5.4 Exemptions**

- None recognised

## **6. 143905000-PM-06: Supervise personnel, NQF Level 4, Credits 6**

### **6.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain supervisor competencies related to general personnel management activities.

The learner will be required to:

- PM-06-PS01: Attend to first-line discipline
- PM-06-PS02: Conduct a performance evaluation interview
- PM-06-PS03: Address performance related problems
- PM-06-PS04: Resolve a workplace grievance
- PM-06-PS05: Resolve workplace and customers' related conflict
- PM-06-PS06: Administer employee records
- PM-06-PS07: Coach employees

### **6.2 Guidelines for Practical Skills**

#### **6.2.1. PM-06-PS01: Attend to first-line discipline**

##### ***Scope of Practical Skill***

Given a range of simulated learning exercise on discipline, disciplinary procedures and records and disciplinary interviews, the learner must be able to:

- PA0101 Organise misconduct in terms of seriousness
- PA0102 Complete disciplinary forms and records
- PA0103 Act in various roles during a simulated disciplinary hearing, including initiator, management witness, and accused

##### ***Applied Knowledge***

- AK0101 Code of conduct: Discipline
- AK0102 Disciplinary procedures, documentation and administration
- AK0103 Fairness
- AK0104 Roles of different parties

##### ***Internal Assessment Criteria***

- IAC0101 An understanding of disciplinary procedures and standard practices are demonstrated
- IAC0102 The impact of deviations from standard codes and practices are explained
- IAC0103 The roles of different parties in a disciplinary hearing are explained

#### **6.2.2. PM-06-PS02: Conduct a performance evaluation interview**

### ***Scope of Practical Skill***

Given a range of simulated learning exercise on work targets, personnel performance standards and performance interviews, the learner must be able to:

- PA0201 Evaluate individual performance records
- PA0202 Conduct a performance feedback session
- PA0203 Agree on performance improvement actions

### ***Applied Knowledge***

- AK0201 Performance goals
- AK0202 Performance interviews
- AK0203 Inter-personal relations

### ***Internal Assessment Criteria***

- IAC0201 Performance agreements are reached and measurable targets agreed upon

## **6.2.3. PM-06-PS03: Address performance related problems**

### ***Scope of Practical Skill***

Given a range of simulated learning exercises addressing poor performance and conducting performance interviews, the learner must be able to:

- PA0301 Evaluate records of performance-related problems and formulated corrective actions
- PA0302 Complete performance counselling forms and records
- PA0303 Act in various roles during simulated performance counselling interviews, including initiator, accused and chairperson
- PA0304 Conduct a coaching session

### ***Applied Knowledge***

- AK0301 Code of Conduct: Poor performance
- AK0302 Procedures, documentation and administration
- AK0303 CCMA Precedence
- AK0304 Fairness
- AK0305 Roles of different parties
- AK0306 Principles of coaching
- AK0307 Inter-personal relations

### ***Internal Assessment Criteria***

- IAC0301 Performance investigation, hearing procedures and standard practices are adhered to

- IAC0302 The impact of deviations from standard codes and practices are explained
- IAC0303 The roles of different parties in a performance hearing are explained

#### **6.2.4. PM-06-PS04: Resolve a workplace grievance**

##### ***Scope of Practical Skill***

Given a range of simulated learning exercises on workplace grievances, grievance procedures and grievance resolution meetings, the learner must be able to:

- PA0401 Evaluate a grievance and formulate corrective actions
- PA0402 Complete grievance resolution forms and records
- PA0403 Act in various roles during a simulated grievance hearing, including aggrieved person, line manager and chairperson
- PA0404 Address personal problems and requests by subordinates during a simulated role-play

##### ***Applied Knowledge***

- AK0401 Grievance procedures
- AK0402 Inter-personal relations

##### ***Internal Assessment Criteria***

- IAC0401 Grievances are addressed in a constructive manner
- IAC0402 The potential impact of unresolved grievances is explained

#### **6.2.5. PM-06-PS05: Resolve workplace and customers' related conflict**

##### ***Scope of Practical Skill***

Given a simulated learning exercise, the learner must be able to:

- PA0501 Act in various roles during a simulated workplace conflict incident between two employees
- PA0502 Resolve the incident and agree on a resolution
- PA0503 Handle a simulated complaint from a customer

##### ***Applied Knowledge***

- AK0501 Approach to conflict resolution
- AK0502 Client complaints (records, potential consequences, complaints procedures, reporting)
- AK0503 Inter-personal relations

##### ***Internal Assessment Criteria***

- IAC0501 Conflict is addressed in a constructive manner

### **6.2.6. PM-06-PS06: Administer employee records**

#### ***Scope of Practical Skill***

Given a controlled learning environment, standard documentation and statutory provisions, the learner must be able to:

- PA0601 Capture employee attendance records
- PA0602 Capture employee leave records (vacation, sick leave, compassion leave) and consolidate leave records in terms of statutory leave provisions
- PA0603 Capture overtime records and consolidate records in terms of statutory overtime provisions

#### ***Applied Knowledge***

- AK0601 Statutory provisions for conditions of employment
- AK0602 Standard documentation

#### ***Internal Assessment Criteria***

- IAC0601 Records are accurate and complete

### **6.2.7. PM-06-PS07: Coach employees**

#### ***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0701 Analyse a work activity and list key competencies and standards
- PA0702 Draft a standard work procedure for the activity
- PA0703 Explain and demonstrate the work activity to a person
- PA0704 Observe the execution of the activity and evaluate performance
- PA0705 Correct areas where the execution is not to the accepted standard

#### ***Applied Knowledge***

- AK0701 Coaching principles
- AK0702 Work activity analysis
- AK0703 Standard work procedure

#### ***Internal Assessment Criteria***

- IAC0701 An understanding of work activity analysis and development of standard work procedures is demonstrated
- IAC0702 The work activity and standards required are demonstrated in a structured manner
- IAC0703 Clear guidance is provided during observations and constructive learning opportunities are facilitated

### **6.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **6.4 Exemptions**

- None recognised

## **7. 143905000-PM-07: Attend to personnel planning, management and control, NQF Level 5, Credits 8**

### **7.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain competencies related to the general personnel management roles and functions of line managers in a contact centre.

The learner will be required to:

- PM-07-PS01: Develop an organisational structure
- PM-07-PS02: Develop a workforce plan
- PM-07-PS03: Draft a shift handover procedure
- PM-07-PS04: Draft personnel cost control schedule

### **7.2 Guidelines for Practical Skills**

#### **7.2.1. PM-07-PS01: Develop an organisational structure**

##### ***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0101 Draw an organogram depicting departmental positions in a contact centre
- PA0102 Identify operational and services departments
- PA0103 Define key departmental roles
- PA0104 Identify personnel position and define personal roles in the structure
- PA0105 Identify subordinate positions, indicate required personnel numbers, and define personal roles

##### ***Applied Knowledge***

- AK0101 Business structuring

##### ***Internal Assessment Criteria***

- IAC0101 An organisation structure is developed that clearly defines roles and positions in the organisation

#### **7.2.2. PM-07-PS02: Develop a workforce plan**

##### ***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0201 Determine workforce requirements against the operational plan
- PA0202 Calculate the contact load from historical data
- PA0203 Calculate the projected workload including shrinkage requirements
- PA0204 Use benchmarked statistical tools to estimate staffing requirements

- PA0205 Calculate staff shrinkage
- PA0206 List potential contingencies and formulate measures to address these
- PA0207 Consolidate and compile a workforce plan and schedule
- PA0208 List workforce planning approval and communication criteria

***Applied Knowledge***

- AK0201 Workforce planning and scheduling metrics
- AK0202 Statistical tools
- AK0203 Statutory requirements

***Internal Assessment Criteria***

- IAC0201 Workforce requirements are calculated using historical and projected data
- IAC0202 Formula selected, statically tools and numerical calculations are correct
- IAC0203 The workforce plan and schedule meet statutory requirements
- IAC0204 An understanding of approval criteria and communication procedures is demonstrated
- IAC0205 The workforce plan is aligned with operational and budget specifications
- IAC0206 The workforce plan recognises potential contingencies and plans are provided to address these

**7.2.3. PM-07-PS03: Draft a shift handover procedure**

***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0301 List key monitoring points that must be controlled during a shift handover for specific functions
- PA0302 Draft a shift handover procedure

***Applied Knowledge***

- AK0301 Shift handover procedures

***Internal Assessment Criteria***

- IAC0301 The shift handover procedures recognises key areas that must be focused on and procedures that must be followed to address these

**7.2.4. PM-07-PS04: Draft personnel cost control schedule**

***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0401 Develop a breakdown of the cost to company for subordinate positions
- PA0402 Draft a control schedule to monitor cost to company
- PA0403 List cost areas that are controlled through workforce planning
- PA0404 List and motivate measures that must be implemented to control these costs

#### ***Applied Knowledge***

- AK0401 Cost to company

#### ***Internal Assessment Criteria***

- IAC0401 A control schedule is developed that is accurate and allows for the control of employee costs

### **7.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **7.4 Exemptions**

- None recognised

## **8. 143905000-PM-08: Attend to industrial relations management and control, NQF Level 5, Credits 8**

### **8.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain competencies related to the general industrial relations management roles and functions of line managers in a contact centre.

The learner will be required to:

- PM-08-PS01: Attend to shop floor discipline
- PM-08-PS02: Attend to grievances
- PM-08-PS03: Attend to capacity related problems
- PM-08-PS04: Resolve conflict
- PM-08-PS05: Respond to and prepare for disputes

### **8.2 Guidelines for Practical Skills**

#### **8.2.1. PM-08-PS01: Attend to shop floor discipline**

##### ***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0101 Categorise specific acts of misconduct as a code of conduct
- PA0102 Formulate the type of misconduct from information provided in case studies
- PA0103 Complete a notice to attend a disciplinary hearing
- PA0104 Act in various roles during a simulated disciplinary hearing, including initiator, management witness, accused and chairperson
- PA0105 Formulate disciplinary sanctions based on a range of case studies
- PA0106 Establish compliance to procedural and substantive fairness requirements based on a range of case studies

##### ***Applied Knowledge***

- AK0101 Code of conduct: Discipline
- AK0102 Disciplinary procedures, documentation and administration
- AK0103 Principles established through cases and awards
- AK0104 Statutory provisions on fairness
- AK0105 Roles of different parties
- AK0106 Rights of parties

##### ***Internal Assessment Criteria***

- IAC0101 An understanding of the different categories of misconduct is demonstrated

- IAC0102 An understanding of the different roles of persons involved in a disciplinary enquiry is demonstrated
- IAC0103 An understanding of the statutory requirements for fairness is demonstrated
- IAC0104 An understanding of case law and determinations related to discipline is demonstrated

### **8.2.2. PM-08-PS02: Attend to grievances**

#### ***Scope of Practical Skill***

Given a range of simulated learning exercises on workplace grievances, grievance procedures and grievance resolution meetings, the learner must be able to:

- PA0201 Evaluate a grievance and formulated corrective actions
- PA0202 Complete grievance resolution forms and records
- PA0203 Act in various roles during a simulated grievance hearing, including aggrieved person, line manager and chairperson
- PA0204 Address personal problems and requests by subordinates during a simulated role-play

#### ***Applied Knowledge***

- AK0201 Grievance procedures
- AK0202 Inter-personal relations

#### ***Internal Assessment Criteria***

- IAC0201 Grievances are addressed in a constructive manner
- IAC0202 The potential impact of unresolved grievances is explained

### **8.2.3. PM-08-PS03: Attend to capacity related problems**

#### ***Scope of Practical Skill***

Given a range of simulated learning exercises addressing poor performance and conducting performance interviews, the learner must be able to:

- PA0301 Evaluate records of performance-related problems and formulate corrective actions
- PA0302 Complete performance counselling forms and records
- PA0303 Act in various roles during simulated performance counselling interviews, including initiator, accused and chairperson
- PA0304 Conduct a coaching session

#### ***Applied Knowledge***

- AK0301 Code of Conduct: Poor performance
- AK0302 Procedures, documentation and administration

- AK0303 Principles established through cases and awards
- AK0304 Fairness
- AK0305 Roles of different parties
- AK0306 Principles of coaching
- AK0307 Inter-personal relations

***Internal Assessment Criteria***

- IAC0301 Performance investigation, hearing procedures and standard practices are adhered to
- IAC0302 The impact of deviations from standard codes and practices are explained
- IAC0303 The roles of different parties in a performance hearing are explained

**8.2.4. PM-08-PS04: Resolve conflict**

***Scope of Practical Skill***

Given a simulated learning exercise, the learner must be able to:

- PA0401 Evaluate conflict incidents between two employees and formulate possible resolutions
- PA0402 Facilitate an internal dispute meeting based on conflict between two employees and agree on a resolution

***Applied Knowledge***

- AK0401 Approach to conflict resolution
- AK0402 Inter-personal relations

***Internal Assessment Criteria***

- IAC0401 Conflict is addressed in a constructive manner

**8.2.5. PM-08-PS05: Respond to and prepare for disputes**

***Scope of Practical Skill***

Given a simulated learning exercise, the learner must be able to:

- PA0501 Read and interpret notices of dispute based on a range of case studies and formulate a response
- PA0502 Draft a control sheet for use during the preparation phase of a conciliation process and motivate the inclusions of the different items
- PA0503 Draft a control sheet for use during the preparation phase of a mediation process and motivate the inclusions of the different items
- PA0504 Draft a control sheet for use during the preparation phase of an arbitration process and motivate the inclusion of the different items

### ***Applied Knowledge***

- AK0501 The statutory dispute resolution system
- AK0502 Dispute resolution processes

### ***Internal Assessment Criteria***

- IAC0501 Response to dispute notices demonstrates an understanding of the dispute resolution system
- IAC0502 Control sheets demonstrate an understanding of the dispute resolution processes

## **8.3 Provider Programme Accreditation Criteria**

### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

## **8.4 Exemptions**

- None recognised

## **9. 143905000-PM-09: Attend to performance and training management and control, NQF Level 5, Credits 4**

### **9.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain competencies related to the general performance and training management roles and functions of line managers in a contact centre.

The learner will be required to:

- PM-09-PS01: Conduct a recruitment interview
- PM-09-PS02: Manage performance
- PM-09-PS03: Coordinate and manage training

### **9.2 Guidelines for Practical Skills**

#### **9.2.1. PM-09-PS01: Conduct a recruitment interview**

##### ***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0101 Draw up a notice of a job vacancy for recruitment purposes
- PA0102 Develop a selection interview sheet
- PA0103 Conduct a simulated selection interview

##### ***Applied Knowledge***

- AK0101 Recruitment notices
- AK0102 Selection process

##### ***Internal Assessment Criteria***

- IAC0101 The recruitment notice provides clear guidelines to prospective employees on the job details required from a successful applicant
- IAC0102 The selection interview sheet provides clear guidelines on key competencies required from the successful candidate
- IAC0103 The selection interview is conducted in a structured manner that encourages open and free communication

#### **9.2.2. PM-09-PS02: Manage performance**

##### ***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0201 Develop a performance agreement
- PA0202 Conduct a simulated performance appraisal

- PA0203 Develop a staff satisfaction survey instrument

#### ***Applied Knowledge***

- AK0201 Performance management principles
- AK0202 Staff satisfaction surveys

#### ***Internal Assessment Criteria***

- IAC0201 A performance agreement is developed that provides clear performance standards, delegated responsibilities and targets
- IAC0202 The performance interview is conducted in a structured manner and recognises areas of good performance, highlights performance improvement areas and provides for a plan to address performance gaps
- IAC0203 The staff satisfaction survey instrument consists of questions that will provide measurable responses in specific focus areas

### **9.2.3. PM-09-PS03: Coordinate and manage training**

#### ***Scope of Practical Skill***

Given a controlled learning environment, the learner must be able to:

- PA0301 Identify the training needs of individual employees based on performance records and personal profiles
- PA0302 Draft a motivation for a training intervention that clearly outlines the required training outcomes and benefits
- PA0303 Develop an annual training schedule and budget
- PA0304 Develop a control sheet for evaluating the impact of training on specified required improvement areas

#### ***Applied Knowledge***

- AK0301 Training needs analysis
- AK0302 Training impact assessment

#### ***Internal Assessment Criteria***

- IAC0301 Training needs are accurately identified and the required outcomes and benefits specified
- IAC0302 A training budget and schedule are developed that meet operational requirements
- IAC0303 An impact assessment tool is developed that is practical and meaningful

### **9.3 Provider Programme Accreditation Criteria**

#### ***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

**9.4 Exemptions**

- None recognised.

## **10. 143905000-PM-10: Administer supplier service level agreements, NQF Level 6, Credits 6**

### **10.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to develop learner competencies related to the administration of service level agreements in the contact centre environment.

The learner will be required to:

- PM-10-PS01: Read and interpret supplier service level agreements
- PM-10-PS02: Identify business requirements for the supplier service level agreement
- PM-10-PS03: Generate and present service level agreement reports
- PM-10-PS04: Validate claims and resolution reports

### **10.2 Guidelines for Practical Skills**

#### **10.2.1. PM-10-PS01: Read and interpret supplier service level agreements**

##### ***Scope of Practical Skill***

Given a range of supplier SLAs, the learner must be able to:

- PA0101 Identify the specific deliverables related to the business requirements
- PA0102 List the supplier requirements to meet SLA deliverables
- PA0103 Align the deliverable with current operational targets and business requirements
- PA0104 Identify potential business risks related to the timeous successful delivery of agreed-to services
- PA0105 Develop an operational plan to monitor and control the delivery and supply of services
- PA0106 Develop supply management procedures to manage the SLA

##### ***Applied Knowledge***

- AK0101 Interpretation of an SLA and Terms of Reference
- AK0102 Operational risks
- AK0103 Legal compliance
- AK0104 Operational control procedures

##### ***Internal Assessment Criteria***

- IAC0101 The interpretation of deliverables is accurate and comprehensive
- IAC0102 Deliverables are defined in terms of specific targets and services required as outlined in the Terms of Reference
- IAC0103 Potential risks are defined and related management processes are explained
- IAC0104 Supply management procedures are implementable, practicable and cost effective

## **10.2.2. PM-10-PS02: Identify business requirements for the supplier service level agreement**

### ***Scope of Practical Skill***

Given a simulated exercise and access to a reports and data, the learner must be able to:

- PA0201 Develop a business needs analysis process and standard documentation
- PA0202 Conduct a business needs analysis
- PA0203 Extract, collate and analyse data
- PA0204 Formulate business needs and specifications, the Terms of Reference and procedural requirements

### ***Applied Knowledge***

- AK0201 Needs analysis
- AK0202 Data analysis

### ***Internal Assessment Criteria***

- IAC0201 The needs analysis is accurate and comprehensive
- IAC0202 Business needs are defined in terms of specific standards and aligned with operational requirements
- IAC0203 Potential risks are defined and related management processes explained
- IAC0204 Business needs and standards are realistic, practicable and cost effective

## **10.2.3. PM-10-PS03: Generate and present service level agreement reports**

### ***Scope of Practical Skill***

Given a simulated exercise, the SLA and standard reports the learner must be able to:

- PA0301 Analyse standard reports against SLA requirements to identify areas above, within and below specification
- PA0302 Collate information and prepare feedback reports
- PA0303 A performance feedback report is prepared to explain performance levels from the SLA
- PA0304 Recommendations are formulated to address deviations and continuous improvement initiatives within manageable time lines

### ***Applied Knowledge***

- AK0301 Report writing
- AK0302 Performance metrics
- AK0303 Systematic analysis and problem solving
- AK0304 Performance evaluation and recommendations

### ***Internal Assessment Criteria***

- IAC0301 Reports developed are presentable, comprehensive and accurate
- IAC0302 Data presented is accurately formulated
- IAC0303 A systematic and structured approach is followed to analyse data and prepare the report
- IAC0304 Recommendations are implementable, cost effective within manageable time lines

#### **10.2.4. PM-10-PS04: Validate claims and resolution reports**

##### ***Scope of Practical Skill***

Given a simulated exercise, source documents and a range of claims, the learner must be able to:

- PA0401 Validate invoices received against standard service delivery records (purchase or sales documentation)
- PA0402 Compile validation reports for invoicing related to services delivered in accordance with SLA
- PA0403 Reconcile invoices received with the actual agreement and service delivery records

##### ***Applied Knowledge***

- AK0401 Validation
- AK0402 Reconciliation
- AK0403 Invoicing
- AK0404 Budget variance reports
- AK0405 SLA deliverables

##### ***Internal Assessment Criteria***

- IAC0401 The validation of invoices received and payments authorised is accurate, complete and aligned to budget

#### **10.3 Provider Programme Accreditation Criteria**

##### ***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

##### ***Human Resource Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

##### ***Legal Requirements:***

- Compliance with occupational health, safety and environmental protection regulations.

#### **10.4 Exemptions**

- None recognised



## **11. 143905000-PM-11: Attend to customer/client/supplier communication, NQF Level 6, Credits 8**

### **11.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to develop learner competencies related to attending to a range of communication requirements in the contact centre environment.

The learner will be required to:

- PM-11-PS01: Conduct a consumer/client satisfaction survey
- PM-11-PS02: Chair meetings and deliver reports
- PM-11-PS03: Manage stakeholder briefings and information sharing
- PM-11-PS04: Manage compliments and complaints

### **11.2 Guidelines for Practical Skills**

#### **11.2.1. PM-11-PS01: Conduct a consumer/client satisfaction survey**

##### ***Scope of Practical Skill***

Given a simulated exercise the learner must be able to:

- PA0101 Develop a customer or client satisfaction survey process that will define the purpose and methodology
- PA0102 Develop measurable criteria and related questions that will evaluate client satisfaction
- PA0103 Develop a survey implementation plan and budget
- PA0104 Read and interpret client or customer satisfaction survey responses
- PA0105 Collate information on responses received and identify trends
- PA0106 Formulate recommendations and compile a satisfaction survey report
- PA0107 Develop a management plan to maintain services levels as well as improve services where required

##### ***Applied Knowledge***

- AK0101 Survey management concepts and principles
- AK0102 Question formulation
- AK0103 Trend analysis
- AK0104 Survey metrics and statistics
- AK0105 Systematic analysis and problem solving

##### ***Internal Assessment Criteria***

- IAC0101 The survey purpose and methodology are aligned to the specifications in the SLA
- IAC0102 Questions formulated must deliver measurable results that are in line with the SLA

- IAC0103 Reports developed are presentable, comprehensive and accurate
- IAC0104 Data presented is accurately formulated
- IAC0105 A systematic and structured approach is followed to analyse data and prepare the report

### **11.2.2. PM-11-PS02: Chair meetings and deliver reports**

#### ***Scope of Practical Skill***

Given a simulated exercise the learner must be able to:

- PA0201 Coordinate and request meetings (attendance, notice, agenda, minutes of the previous meeting)
- PA0202 Chair a formal meetings
- PA0203 Deliver feedback report and supporting presentation
- PA0204 Develop a schedule to control achievement of agreed to deliverables within time frames, accountabilities, and delegated authorities

#### ***Applied Knowledge***

- AK0201 Meeting procedures and formalities
- AK0202 Meeting administration
- AK0203 Presentations
- AK0204 Responding to questions and objections
- AK0205 Meeting management and productivity
- AK0206 Delegations, accountabilities and authorities
- AK0207 Task and deliverable management tools

#### ***Internal Assessment Criteria***

- IAC0201 Meeting documentation is presentable, accurate and timeous
- IAC0202 Structured supporting documents and presentations are presented
- IAC0203 Effective meeting procedures are followed

### **11.2.3. PM-11-PS03: Manage stakeholder briefings and information sharing**

#### ***Scope of Practical Skill***

Given a simulated exercise the learner must be able to:

- PA0301 Develop a content framework outline for an information sharing notice
- PA0302 Develop the draft content of an information sharing notice that meets the outline specifications

### ***Applied Knowledge***

- AK0301 Information sharing concepts and principles

### ***Internal Assessment Criteria***

- IAC0301 The content outline has a clear communication purpose, structure, plan and methodology
- IAC0302 The draft notice meets the requirements of the content framework outline

## **11.2.4. PM-11-PS04: Manage compliments and complaints**

### ***Scope of Practical Skill***

Given a simulated exercise the learner must be able to:

- PA0401 Develop a customer/client complaints and compliments management process framework that will define the purpose and methodology aligned to the SLA and regulatory requirements
- PA0402 Develop a complaints escalation, resolution and tracking process framework with clear delegated authorities and time lines
- PA0403 Develop a customer/client relations management process framework to prevent complaints
- PA0404 Read and interpret client or customer complaints and compliments reports against SLA
- PA0405 Collate information on responses received and identify trends
- PA0406 Formulate recommendations and compile a complaints/compliments report
- PA0407 Draft a response to a complaint received
- PA0408 Develop a management plan to maintain services levels, as well as improve services where required

### ***Applied Knowledge***

- AK0401 Management of social media complaints
- AK0402 Complaints management, resolution and tracking
- AK0403 Complaints management channels - voice, e-mail, web, fax, white mail, SMS and all new interaction channels
- AK0404 Compliment management
- AK0405 Process requirements
- AK0406 Dealing with difficult customers

### ***Internal Assessment Criteria***

- IAC0401 Process framework/flow diagrams are developed that clearly define process flow, key focus areas, policy, procedural and standard documentation requirements
- IAC0402 Data presented is accurately formulated
- IAC0403 A systematic and structured approach is followed to analyse data and prepare the report

- IAC0404 Recommendations are implementable, and cost effective within manageable time lines
- IAC0405 A clear strategic focus on operational strategies, plans and targets is maintained

### **11.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Demonstrate access to:
  - A fully operational feed milling production unit.
  - Learning and assessment resources.

#### *Human Resource Requirements:*

- Facilitators with module matter expertise.
- A learner facilitator ratio of no more than 1:15.
- Assessors with recognised assessment practice training and module matter expertise.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.
- Personal protective equipment.

### **11.4 Exemptions**

- None recognised

## **12. 143905000-PM-12: Assure the output of the service delivery by agents, NQF Level 6, Credits 8**

### **12.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain the practical skills related to assuring the quality of the services delivered by agents in a contact centre environment.

The learner will be required to:

- PM-12-PS01: Calibrate calls
- PM-12-PS02: Output service delivery quality monitoring plan
- PM-12-PS03: Conduct internal auditing procedures on output quality standards
- PM-12-PS04: Prepare for external audits on output quality standards
- PM-12-PS05: Develop and conduct output services benchmarking meetings and reports

### **12.2 Guidelines for Practical Skills**

#### **12.2.1. PM-12-PS01: Calibrate calls**

##### ***Scope of Practical Skill***

Given quality data on customer interactions, and simulated meeting the learner must be able to:

- PA0101 Select quality monitored samples for calibration
- PA0102 Compare quality scores of quality monitored calls
- PA0103 Review the selected quality monitored interaction (e-mail, calls)
- PA0104 Report on findings
- PA0105 Confirm scoring and criteria alignment

##### ***Applied Knowledge***

- AK0101 Calibration methodology, principles and practices
- AK0102 Quality monitoring criteria
- AK0103 Conduct meetings
- AK0104 Random selection and sample size

##### ***Internal Assessment Criteria***

- IAC0101 An understanding of sampling practices and sample selection is demonstrated
- IAC0102 Calibration quality analysis practices are performed and scored
- IAC0103 Meeting reports, minutes and action plan on meeting outcomes are drafted

#### **12.2.2. PM-12-PS02: Output service delivery quality monitoring plan**

##### ***Scope of Practical Skill***

Given a simulated exercise the learner must be able to:

- PA0201 Define quality monitoring assessment checklists, including compliance, business process and customer-related process, as well as critical and non-critical errors
- PA0202 Select quality monitoring sample to assess actual interaction against assessment criteria
- PA0203 Apply appropriate quality monitoring methods and tools to assess actual interaction against assessment criteria
- PA0204 Score against critical and non-critical errors and provide commentary on gaps
- PA0205 Compile individual and organisational feedback and action plan

***Applied Knowledge***

- AK0201 Quality management principles and practices
- AK0202 Knowledge of compliance, business processes and customer-related processes

***Internal Assessment Criteria***

- IAC0201 A quality-monitoring plan is developed that measures critical and non-critical criteria

**12.2.3. PM-12-PS03: Conduct internal auditing procedures on output quality standards**

***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0301 Draft methodology
- PA0302 Specify frequency
- PA0303 Select internal auditing criteria and requirements
- PA0304 Compare internal collected and collated data against pre-established quality standards
- PA0305 Identify gaps and develop action plan to close gaps
- PA0306 Compile report

***Applied Knowledge***

- AK0301 Communication and coordination
- AK0302 Auditing principles and practices

***Internal Assessment Criteria***

- IAC0301 The audit methodology selected is appropriate and fit for purpose
- IAC0302 Data compilation and comparison are completed using appropriate techniques
- IAC0303 Reports on audit results are comprehensive and accurate

**12.2.4. PM-12-PS04: Prepare for external audits on output quality standards**

### ***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0401 Review external auditing criteria and requirements
- PA0402 Prepare and collate required documentation
- PA0403 Review audit results
- PA0404 Prepare an action plan to rectify gaps

### ***Applied Knowledge***

- AK0401 External auditing procedures and requirements

### ***Internal Assessment Criteria***

- IAC0401 Required documentation is submitted against auditing criteria and requirements

## **12.2.5. PM-12-PS05: Develop and conduct output services benchmarking meetings and reports**

### ***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0501 List performance objectives to be benchmarked
- PA0502 Source external and internal benchmarking results
- PA0503 Compile and gather data for predetermined performance objectives
- PA0504 Compare gathered data against sourced data
- PA0505 Identify improvement areas

### ***Applied Knowledge***

- AK0501 Communication and coordination
- AK0502 Benchmarking practice and principles
- AK0503 Compilation and gathering of data

### ***Internal Assessment Criteria***

- IAC0501 List of performance objectives and methodology of sourcing benchmarking results are appropriate
- IAC0502 Report on gathered data comparison and identification of improvement areas is accurate and complete

## **12.3 Provider Programme Accreditation Criteria**

*Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

*Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

**12.4 Exemptions**

- None recognised.

## **13. 143905000-PM-13: Evaluate MIS reports and ensure system efficiency, NQF Level 5, Credits 6**

### **13.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to gain the practical skills related to accessing and evaluating data generated by management information systems reports.

The learner will be required to:

- PM-13-PS01: Access and evaluate standard MIS reports

### **13.2 Guidelines for Practical Skills**

#### **13.2.1. PM-13-PS01: Access and evaluate standard MIS reports**

##### ***Scope of Practical Skill***

Given standard Management Information Systems and reporting templates the learner must be able to:

- PA0101 Select data ranges, dates, target group parameters to compile a systems-generated report
- PA0102 Identify report content to measure organisational objectives or targets or benchmarked results
- PA0103 Present data in a report template
- PA0104 Compare and interpret collated results against organisational objectives or targets or benchmarked results
- PA0105 Identify results that exceed, meet or are below set requirements
- PA0106 Identify root cause analysis and provide recommendations and/or action plan
- PA0107 Compile a report and the intended audience distribution list
- PA0108 Preventative analysis resulting in business improvement is explained

##### ***Applied Knowledge***

- AK0101 Systems
- AK0102 Organisational objectives
- AK0103 Presentation
- AK0104 Data and root cause analysis
- AK0105 Report presentation and detailing summary

##### ***Internal Assessment Criteria***

- IAC0101 Data gathering and comparison is demonstrated
- IAC0102 Reports are explained and improvements to the business are identified
- IAC0103 Report is presented indicating correct data gathering and interpretation with a summary of information

### **13.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations.

### **13.4 Exemptions**

- None recognised.

## **14. 143905000-PM-14: Manage a customer contact process, NQF Level 6, Credits 8**

### **14.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to develop managerial competencies related to the customer contact process.

The learner will be required to:

- PM-14-PS01: Establish a customer contact process
- PM-14-PS02: Manage the operational customer interaction systems

### **14.2 Guidelines for Practical Skills**

#### **14.2.1. PM-14-PS01: Establish a customer contact process**

##### ***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0101 Define the process based on business, customer interaction, statutory and service delivery requirements
- PA0102 Apply business rules on the process
- PA0103 Map the service delivery process
- PA0104 Identify possible service failure areas
- PA0105 Map the service recovery process
- PA0106 Map the service escalation process
- PA0107 Map the communication flow process
- PA0108 Map the required knowledge, systems and skills requirements to support and enhance the customer contact process
- PA0109 Map the requirements to ensure effective application of support structures as per SLAs

##### ***Applied Knowledge***

- AK0101 Interpretation of an SLA and the relevant deliverables
- AK0102 Aligning business rules to client requirements
- AK0103 Understanding process design and mapping
- AK0104 The impact of support processes on the effective implementation and maintenance of a customer contact process
- AK0105 Evaluate and align system, knowledge and skills requirements to ensure effective implementation of customer contact process

##### ***Internal Assessment Criteria***

- IAC0101 The process defined must meet the operational objectives and client requirements
- IAC0102 Defined process must include audit protocols

- IAC0103 Mapped processes are implementable, practicable and cost effective and must be version controlled
- IAC0104 Identification of systems, knowledge and skill requirements is accurate and comprehensive
- IAC0105 Potential operational and financial consequences of non-adherence are defined and related management process is explained
- IAC0106 The implementation of communication processes is efficient and effective
- IAC0107 A strategy, which aligns the systems, knowledge and skills requirements in a customer contact process, is designed

#### **14.2.2. PM-14-PS02: Manage the operational customer interaction systems**

##### ***Scope of Practical Skill***

Given a simulated learning environment, the learner must be able to:

- PA0201 Explain the various customer interaction systems, including the support processes required for the effective implementation and achievement of operational customer interaction systems
- PA0202 Identify and explain various inbound and outbound customer interaction systems
- PA0203 Document and track interaction routing using a flow diagram
- PA0204 List the different customer interaction types, and determine capabilities and capacity criteria
- PA0205 Align the customer interaction processes with operational and support processes to ensure that business objectives, customer requirements and performance metrics are met
- PA0206 Explain the benefits of a well-constructed customer interaction system
- PA0207 Extract and interpret statistics for accurate reporting
- PA0208 Identify problem areas or changes in a simulated customer interaction system, and make recommendations to improve and re-engineer processes
- PA0209 Evaluate user acceptance test results

##### ***Applied Knowledge***

- AK0201 Working knowledge of customer interaction systems, including telephony and multi-media
- AK0202 Technical knowledge of customer interaction systems, including telephony and multi-media
- AK0203 Evaluation and monitoring of processes
- AK0204 The principles of risk management and the impact of non-adherence on the operational environment
- AK0205 Problem solving and decision making methods

##### ***Internal Assessment Criteria***

- IAC0201 Comprehensive knowledge and understanding of customer interaction systems, including telephony and multi-media is demonstrated

- IAC0202 Auditing protocol ensures transparency while protecting customer confidentiality and rights
- IAC0203 Analysis of data and reporting provides sufficient information to support problem solving and decision making
- IAC0204 Acceptance testing is accurately reported on and practical recommendations are made

### **14.3 Provider Programme Accreditation Criteria**

#### *Physical Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers

#### *Human Resource Requirements:*

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers

#### *Legal Requirements:*

- Compliance with occupational health, safety and environmental protection regulations

### **14.4 Exemptions**

- None recognised

## **15. 143905000-PM-15: Manage process and technology improvement projects, NQF Level 5, Credits 4**

### **15.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to develop project management competencies that will enable the learner to manage internal work-related projects.

The learner will be required to:

- PM-15-PS01: Develop a project plan
- PM-15-PS02: Implement the project plan
- PM-15-PS03: Perform a project close-out evaluation

### **15.2 Guidelines for Practical Skills**

#### **15.2.1. PM-15-PS01: Develop a project plan**

##### ***Scope of Practical Skill***

Given a simulated exercise on process and technology improvement, the learner must be able to:

- PA0101 Define the scope of the project
- PA0102 Schedule project activities
- PA0103 Establish key project milestones
- PA0104 Determine project resource requirement
- PA0105 Develop a project budget
- PA0106 Establish project risks and responses

##### ***Applied Knowledge***

- AK0101 Project management

##### ***Internal Assessment Criteria***

- IAC0101 A project plan is developed that includes a clear scope, deliverable, milestones; resources required, a budget, and a risk assessment

#### **15.2.2. PM-15-PS02: Implement the project plan**

##### ***Scope of Practical Skill***

Given a simulated exercise on process and technology improvement, the learner must be able to:

- PA0201 Develop project management and control tools
- PA0202 Design a project reporting system
- PA0203 Compile a project progress report on progress on targets, key milestones, budget control, and risks
- PA0204 Set up and chair a project team meeting

### ***Applied Knowledge***

- AK0201 Project management

### ***Internal Assessment Criteria***

- IAC0201 Tools and systems are developed for the control of the project and reporting on project progress and implementation

### **15.2.3. PM-15-PS03: Perform a project close-out evaluation**

#### ***Scope of Practical Skill***

Given a simulated exercise on process and technology improvement, the learner must be able to:

- PA0301 Design criteria for a technical close-out review
- PA0302 Design criteria for a financial close-out review
- PA0303 Design criteria for an operational close-out review

### ***Applied Knowledge***

- AK0301 Project management

### ***Internal Assessment Criteria***

- IAC0301 Criteria for the close-out review are developed that provide an overview of the project achievement, the budget and transferral of the operational systems to the client

## **15.3 Provider Programme Accreditation Criteria**

### ***Physical Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

### ***Human Resource Requirements:***

- Meet requirements as set out by the QCTO appointed AQP for accreditation of skills development providers.

### ***Legal Requirements:***

- Compliance with occupational health, safety and environmental protection regulations.

## **15.4 Exemptions**

- None recognised

## SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS

### List of Work Experience Module Specifications

- 143905000-WM-01, Attend to standard financial control procedures in a contact centre environment, NQF Level 6, Credits 10
- 143905000-WM-02, Maintain productive and effective work teams for an operational unit in a contact centre, NQF Level 4, Credits 12
- 143905000-WM-03, Attend to operational target- and standard-setting processes in a contact centre environment, NQF Level 5, Credits 13
- 143905000-WM-04, Attend to team leadership and first-line discipline for an operational unit in a contact centre at supervisory level, NQF Level 4, Credits 8
- 143905000-WM-05, Attend to personnel management processes in a contact centre environment within the delegated functions of line management, NQF Level 5, Credits 16
- 143905000-WM-06, Attend to customer and supplier relations management processes in a contact centre environment, NQF Level 6, Credits 16
- 143905000-WM-07, Assure quality standards in a contact centre environment, NQF Level 5, Credits 16
- 143905000-WM-08, Attend to process and technology efficiency management processes in a contact centre environment, NQF Level 5, Credits 16

## **1. 143905000-WM-01: Attend to standard financial control procedures in a contact centre environment, NQF Level 6, Credits 10**

### **1.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to financial control procedures under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to financial control procedures through repetition;
- Experience the range of financial control procedures attended to is influenced by the clientele served and the standards applied by the contact centre;
- Experience a further experiential learning opportunity in the practical skills presented by the provider;
- Gain further exposure in the application of knowledge and practical skills by attending to financial control procedures under close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-01-WE01: Assist and observe an experienced person attending to financial controls for a period of one week
- WM-01-WE02: Attend to financial control activities for a period of three weeks under the direct supervision of an experienced contact centre management staff member

### **1.2 Guidelines for Work Experiences**

#### **1.2.1. WM-01-WE01: Assist and observe an experienced person attending to financial controls for a period of one week**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the execution of specific financial control procedures such as budgeting, monitoring of expenses against budgets and general financial administration
- WA0102 Assist with and observe general interaction, reporting and communication on financial matters
- WA0103 Gain exposure in the functions of supporting departments such as the Financial Department

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **1.2.2. WM-01-WE02: Attend to financial control activities for a period of three weeks under the direct supervision of an experienced contact centre management staff member**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to the execution of specific financial control functions related to budgeting, controlling of budgets and related expenses, financial administration and reporting

- WA0202 Attend to general interaction, reporting and communication on budgets and the control of expenses
- WA0203 Adhere to workplace policies and procedures related to financial controls and delegations
- WA0204 Attend at least four meetings on financial reporting and planning and present at least one financial report at a meeting

### ***Supporting Evidence***

- SE0201 Financial records and reports
- SE0202 Minutes of meetings

### **1.3 Contextualised Workplace Knowledge**

1. Data capturing and reporting systems
2. Financial policies and procedures
3. Budgeting and budget control

### **1.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners.

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements.

### **1.5 Additional Assignments to be Assessed Externally**

None specified

None specified

## **2. 143905000-WM-02: Maintain productive and effective work teams for an operational unit in a contact centre, NQF Level 4, Credits 12**

### **2.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to subordinate team members under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to team leadership and supervision through repetition;
- Experience the range of team leadership and supervisory procedures attended to is influenced by the delegated responsibilities and the standards applied by the contact centre;
- Experience further experiential learning opportunity in the practical skills presented by the provider;
- Gain further exposure in the application of knowledge and practical skills by attending to team leadership and supervisory procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-02-WE01: Assist and observe an experienced person directing work teams and supervising work activities for a period of two weeks
- WM-02-WE02: Attend to team leadership and supervision for a period of three weeks under the direct supervision of an experienced contact centre management staff member

### **2.2 Guidelines for Work Experiences**

#### **2.2.1. WM-02-WE01: Assist and observe an experienced person directing work teams and supervising work activities for a period of two weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the general team leadership and supervisory activities
- WA0102 Assist with and observe general interaction, reporting and communication with persons in managerial positions
- WA0103 Gain exposure in the functions of supporting HR functions such as the HR Department

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **2.2.2. WM-02-WE02: Attend to team leadership and supervision for a period of three weeks under the direct supervision of an experienced contact centre management staff member**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to the execution of activities such as work planning and target setting, evaluation of outputs and quality standards, performance evaluation and reporting, team meetings, data capturing, and evaluation of system reports

- WA0202 Attend to general interaction, reporting and communication with persons in managerial positions; under direct supervision
- WA0203 Adhere to workplace policies, procedures and delegated authorities
- WA0204 Attend at least four meetings on operational reporting and planning and present at least one report on team performance at a meeting

### ***Supporting Evidence***

- SE0201 Standard operational reports
- SE0202 Minutes of meetings

### **2.3 Contextualised Workplace Knowledge**

1. Data capturing and reporting systems
2. HR policies and procedures
3. Operational control standards

### **2.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements

### **2.5 Additional Assignments to be Assessed Externally**

None specified

### **3. 143905000-WM-03: Attend to operational target- and standard-setting processes in a contact centre environment, NQF Level 5, Credits 13**

#### **3.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to operational target- and standard-setting procedures under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to operational target- and standard-setting procedures through repetition. The range of operational target- and standard-setting procedures attended to is influenced by the clientele served and the standards applied by the contact centre;
- Experience further experiential learning opportunity in the practical skills presented by the provider ;
- Gain further exposure in the application of knowledge and practical skills by attending to operational target- and standard-setting procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-03-WE01: Assist and observe an experienced person with the managing and controlling of target - and standard - setting procedures for a minimum period of one week
- WM-03-WE02: Attend to operational target - and standard - setting for a period of three weeks under the direct supervision of an experienced contact centre management staff member

#### **3.2 Guidelines for Work Experiences**

##### **3.2.1. WM-03-WE01: Assist and observe an experienced person with the managing and controlling of target - and standard - setting procedures for a minimum period of one week**

###### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the execution of a range of activities related to operational target- and standard-setting
- WA0102 Assist with and observe general interaction, reporting and communication with other departments on matters related to operational planning

###### ***Supporting Evidence***

- SE0101 Report by mentor

##### **3.2.2. WM-03-WE02: Attend to operational target - and standard - setting for a period of three weeks under the direct supervision of an experienced contact centre management staff member**

###### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to operational planning activities, such as defining operational objectives, estimation and formulation of targets and standards, estimation of resources requirements, development of operational plans, evaluation of performance levels against set targets, and formulation of remedial actions to address areas of non-conformance

- WA0202 Attend to the interpretation and alignment of operational processes, targets and standards with service level agreement deliverables
- WA0203 Attend to the management of service level agreement processes, risk management, performance evaluation, and corrective actions
- WA0204 Attend to general interaction, reporting and communication with persons in managerial positions
- WA0205 Adhere to workplace policies and procedures related to operational planning and delegations
- WA0206 Attend at least four meetings on operational reporting and planning and present at least one report on operational targets and standards at a meeting

### ***Supporting Evidence***

- SE0201 Operational reports
- SE0202 Minutes of meetings

### **3.3 Contextualised Workplace Knowledge**

1. Operational targets and quality standards
2. Standard workplace procedures
3. Personnel management policies, procedures and codes

### **3.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners.

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements.

### **3.5 Additional Assignments to be Assessed Externally**

None specified

## **4. 143905000-WM-04: Attend to team leadership and first-line discipline for an operational unit in a contact centre at supervisory level, NQF Level 4, Credits 8**

### **4.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to team leadership and first-line discipline procedures under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to team leadership and first-line discipline procedures through repetition;
- Experience the range of team leadership and first-line discipline procedures attended to is influenced by the structure and the standards applied by the contact centre ;
- Experience further experiential learning opportunity in the practical skills presented by the provider;
- Gain further exposure in the application of knowledge and practical skills by attending to team leadership and first-line discipline procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-04-WE01: Assist and observe an experienced person attending to team leadership and first-line discipline for a period of one week
- WM-04-WE02: Attend to team leadership and first-line discipline under the direct supervision of an experienced contact centre management staff member for a period of two weeks

### **4.2 Guidelines for Work Experiences**

#### **4.2.1. WM-04-WE01: Assist and observe an experienced person attending to team leadership and first-line discipline for a period of one week**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the team leadership and supervisory activities
- WA0102 Assist with and observe general interaction, reporting and communication with other departments

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **4.2.2. WM-04-WE02: Attend to team leadership and first-line discipline under the direct supervision of an experienced contact centre management staff member for a period of two weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to supervisory activities such as first-line discipline, target setting and performance evaluation, resolution of grievances, administration of personnel records

- WA0202 Attend to general interaction, reporting and communication with other departments

### **Supporting Evidence**

- SE0201 Personnel reports
- SE0202 Minutes of meetings
- SE0203 Operational reports

### **4.3 Contextualised Workplace Knowledge**

1. Operational targets and quality standards
2. Standard workplace procedures
3. Personnel management policies, procedures and codes
4. Document flow and control

### **4.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements

### **4.5 Additional Assignments to be Assessed Externally**

None specified

## **5. 143905000-WM-05: Attend to personnel management processes in a contact centre environment within the delegated functions of line management, NQF Level 5, Credits 16**

### **5.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to personnel management and control procedures under authentic working conditions
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to personnel management and control procedures through repetition;
- Experience the range of personnel management and control procedures attended to is influenced by the structure and the standards applied by the contact centre;
- Experience further experiential learning opportunity in the practical skills presented by the provider ;
- Gain further exposure in the application of knowledge and practical skills by attending to personnel management and control procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-05-WE01: Assist and observe an experienced line manager responsible for personnel management and control for a period of two weeks
- WM-05-WE02: Attend to personnel management and control procedures for a period of four weeks under the direct supervision of an experienced contact centre management staff member

### **5.2 Guidelines for Work Experiences**

#### **5.2.1. WM-05-WE01: Assist and observe an experienced line manager responsible for personnel management and control for a period of two weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the execution of personnel planning, management and control
- WA0102 Assist with and observe the execution of industrial relations management and control
- WA0103 Assist with and observe the execution of personnel performance and training management and control
- WA0104 Assist with and observe general interaction, reporting and communication with other departments

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **5.2.2. WM-05-WE02: Attend to personnel management and control procedures for a period of four weeks under the direct supervision of an experienced contact centre management staff member**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to personnel management and control activities such as workforce planning, shift management and handover procedures, personnel cost control, personnel records and administration
- WA0202 Attend to industrial relations management and control activities such as the institution and enforcement of discipline, shop floor dispute and conflict resolutions, enforcement of codes of conduct, and industrial relations administration
- WA0203 Attend to personnel performance and training management, and control activities such as job analysis, performance agreements, performance interviews, recruitment and selection, training schedules and budgets, evaluation of the impact of training, training provider selection, and training administration
- WA0204 Attend to general interaction, reporting and communication with other departments

### ***Supporting Evidence***

- SE0201 Operational reports
- SE0202 Minutes of meetings
- SE0203 Personnel records

### **5.3 Contextualised Workplace Knowledge**

1. Operational targets and quality standards
2. Standard workplace procedures
3. Personnel management policies, procedures and codes

### **5.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners.

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements.

### **5.5 Additional Assignments to be Assessed Externally**

None specified

## **6. 143905000-WM-06, Attend to customer and supplier relations management processes in a contact centre environment, NQF Level 6, Credits 16**

### **6.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to customer and supplier relations management procedures under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to customer and supplier relations management procedures through repetition;
- Experience the range of customer and supplier relations management procedures attended to is influenced by the clientele served and the standards applied by the contact centre;
- Experience further experiential learning opportunity in the practical skills presented by the provider;
- Gain further exposure in the application of knowledge and practical skills by attending to customer and supplier relations management procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-06-WE01: Assist with and observe customer and supplier relations management activities for a period of two weeks
- WM-06-WE02: Perform customer and supplier relations' management activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks

### **6.2 Guidelines for Work Experiences**

#### **6.2.1. WM-06-WE01: Assist with and observe customer and supplier relations management activities for a period of two weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the administration of supplier service level agreement and customer/client/supplier communication
- WA0102 Assist with and observe general interaction, reporting and communication

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **6.2.2. WM-06-WE02: Perform customer and supplier relations' management activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to administrative management activities of supplier service level agreements, such as operational planning, monitoring and controlling of delivery standards and targets, data administration and reporting, business requirements for the supplier service level agreement, generation and presentation of service level agreement reports, validation of claims and resolution reports

- WA0202 Attend to customer/client/supplier communication related activities, such as satisfaction surveys, chair meetings and present reports, information sharing notices, stakeholder briefing, complaints and compliments management

### ***Supporting Evidence***

- SE0201 Operational reports
- SE0202 Minutes of meetings

### **6.3 Contextualised Workplace Knowledge**

1. Operational targets and quality standards
2. Standard workplace procedures
3. Supplier service level agreement management policies and procedures

### **6.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners.

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements.

### **6.5 Additional Assignments to be Assessed Externally**

None specified

## **7. 143905000-WM-07, Assure quality standards in a contact centre environment, NQF Level 5, Credits 16**

### **7.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of quality assurance procedures in a contact centre environment under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to quality assurance procedures through repetition;
- Experience the range of quality assurance procedures attended to is influenced by the quality management policies and the standards applied by the contact centre;
- Experience further experiential learning opportunity in the practical skills presented by the provider;
- Gain further exposure in the application of knowledge and practical skills by attending to quality assurance procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-07-WE01: Assist with and observe quality management activities for a period of two weeks
- WM-07-WE02: Perform quality assurance activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks

### **7.2 Guidelines for Work Experiences**

#### **7.2.1. WM-07-WE01: Assist with and observe quality management activities for a period of two weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the administration of supplier service level agreement and customer/client/supplier communication
- WA0102 Assist with and observe general interaction, reporting and communication

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **7.2.2. WM-07-WE02: Perform quality assurance activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to quality assurance activities, such as calibration of calls, monitoring compliance with business processes and customer process, monitoring and assuring output service delivery quality standards, conducting quality reporting and compiling action plans, conducting internal quality auditing, preparing for external quality auditing, conducting output services, benchmarking and reporting

##### ***Supporting Evidence***

- SE0201 Quality reports
- SE0202 Minutes of meetings

### **7.3 Contextualised Workplace Knowledge**

1. Operational targets and quality standards
2. Standard workplace procedures
3. Quality policies and procedures

### **7.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web-chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners.

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements.

### **7.5 Additional Assignments to be Assessed Externally**

None specified

## **8. 143905000-WM-08, Attend to process and technology efficiency management processes in a contact centre environment, NQF Level 5, Credits 16**

### **8.1 Purpose of the Work Experience Modules**

The focus of the work experience is on providing the learner an opportunity to:

- Expose the learner to the complexities of attending to process and technology efficiency management procedures under authentic working conditions;
- Expose the learner to the complexities of dealing with different workplace demands and pressures of work;
- Develop confidence in attending to process and technology efficiency management procedures through repetition;
- Experience the range of process and technology efficiency management procedures attended to is influenced by the processes, technology and the standards applied by the contact centre
- Experience further experiential learning opportunity in the practical skills presented by the provider;
- Gain further exposure in the application of knowledge and practical skills by attending to process and technology efficiency management procedures under the close supervision of an experienced person in the contact centre acting in a mentorship and coaching role.

The learner will be required to:

- WM-08-WE01: Assist with and observe process and technology efficiency management activities for a period of two weeks
- WM-08-WE02: Perform process and technology efficiency management activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks

### **8.2 Guidelines for Work Experiences**

#### **8.2.1. WM-08-WE01: Assist with and observe process and technology efficiency management activities for a period of two weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0101 Assist with and observe the administration of process and technology efficiency management activities for a period of two weeks
- WA0102 Assist with and observe general interaction, reporting and communication

##### ***Supporting Evidence***

- SE0101 Report by mentor

#### **8.2.2. WM-08-WE02: Perform process and technology efficiency management activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Attend to process and technology efficiency management activities, such as compiling systems generated reports for specific reporting purposes, analysing and interpreting data, compiling reports and presenting data
- WA0202 Attend to the administration and management of customer contact and interaction processes such as the establishment of customer contact processes and managing the customer interaction systems
- WA0203 Attend to the management of process and technology improvement processes or projects, such as defining improvement targets, controlling project budgets, monitoring and implementation of improvement plans, project administration and reporting, close out reviews

### ***Supporting Evidence***

- SE0201 MIS reports
- SE0202 Minutes of meetings and reports
- SE0203 Improvement plans and documentation

### **8.3 Contextualised Workplace Knowledge**

1. Operational targets and quality standards
2. Standard workplace procedures
3. Management Information Systems
4. Workplace technology

### **8.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- A contact centre that deals with more than one customer interaction type/channel over and above the call centre channel (Channels being but not limited to - Inbound Call/ Outbound Call/ email/ fax/ SMS/ web--chat) therefore an Inbound and/or Outbound call centre that also utilises another interaction type is a minimum requirement.
- Has 24 plus agents that are directly managed as resources in the contact centre environment on a full time basis.
- The Contact Centre Manager must have direct management control over the agents employed and therefore excludes workplaces that have outsourced the staff management function to a third party.

#### *Human Resource Requirements:*

- A person with 3 years' experience in a managerial role in a contact centre trained as a workplace coach/mentor must be available for every 5 learners.

#### *Legal Requirements:*

- Workplace compliance with occupational health safety and environmental protection requirements.

### **8.5 Additional Assignments to be Assessed Externally**

None specified



#### SECTION 4: STATEMENT OF WORK EXPERIENCE

|                           |                        |
|---------------------------|------------------------|
| <b>Curriculum Number:</b> | 143905000              |
| <b>Curriculum Title:</b>  | Contact Centre Manager |

|                        |  |
|------------------------|--|
| <b>Learner Details</b> |  |
| <b>Name:</b>           |  |
| <b>ID Number:</b>      |  |

|                         |  |
|-------------------------|--|
| <b>Employer Details</b> |  |
| <b>Company Name:</b>    |  |
| <b>Address:</b>         |  |
| <b>Supervisor Name:</b> |  |
| <b>Work Telephone:</b>  |  |
| <b>E-Mail:</b>          |  |

**143905000-WM-01, Attend to standard financial control procedures in a contact centre environment, NQF Level 6, Credits 10**

|            |   |      |           |
|------------|---|------|-----------|
| WM-01-WE01 | Assist and observe an experienced person attending to financial controls for a period of one week   |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0101     | Assist with and observe the execution of specific financial control procedures such as budgeting, monitoring of expenses against budgets and general financial administration |      |           |
| WA0102     | Assist with and observe general interaction, reporting and communication on financial matters   |      |           |
| WA0103     | Gain exposure in the functions of supporting departments such as the Financial Department   |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0101     | Report by mentor  |      |           |
| WM-01-WE02 | Attend to financial control activities for a period of three weeks under the direct supervision of an experienced contact centre management staff member                      |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0201     | Attend to the execution of specific financial control functions related to budgeting, controlling of budgets and related expenses, financial administration and reporting     |      |           |
| WA0202     | Attend to general interaction, reporting and communication on budgets and the control of expenses   |      |           |
| WA0203     | Adhere to workplace policies and procedures related to financial controls and delegations   |      |           |
| WA0204     | Attend at least four meetings on financial reporting and planning and present at least one financial report at a meeting  |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |

|        |                               |  |  |
|--------|-------------------------------|--|--|
| SE0201 | Financial records and reports |  |  |
| SE0202 | Minutes of meetings           |  |  |

|   | <b>Contextualised Workplace Knowledge</b> | Date | Signature |
|---|---|------|-----------|
| 1 | Data capturing and reporting systems      |      |           |
| 2 | Financial policies and procedures         |      |           |
| 3 | Budgeting and budget control              |      |           |

|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
|--|---|------|-----------|
|  |   |      |           |

**143905000-WM-02, Maintain productive and effective work teams for an operational unit in a contact centre, NQF Level 4, Credits 12**

| WM-02-WE01 | Assist and observe an experienced person directing work teams and supervising work activities for a period of two weeks |      |           |
|------------|---|------|-----------|
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0101     | Assist with and observe the general team leadership and supervisory activities  |      |           |
| WA0102     | Assist with and observe general interaction, reporting and communication with persons in managerial positions           |      |           |
| WA0103     | Gain exposure in the functions of supporting HR functions such as the HR Department                                     |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0101     | Report by mentor  |      |           |

|            |  |      |           |
|------------|--|------|-----------|
| WM-02-WE02 | Attend to team leadership and supervision for a period of three weeks under the direct supervision of an experienced contact centre management staff member  |      |           |
|            | <b>Scope Work Experience</b>   | Date | Signature |
| WA0201     | Attend to the execution of activities such as work planning and target setting, evaluation of outputs and quality standards, performance evaluation and reporting, team meetings, data capturing, and evaluation of system reports |      |           |
| WA0202     | Attend to general interaction, reporting and communication with persons in managerial positions; under direct supervision  |      |           |
| WA0203     | Adhere to workplace policies, procedures and delegated authorities   |      |           |
| WA0204     | Attend at least four meetings on operational reporting and planning and present at least one report on team performance at a meeting   |      |           |
|            | <b>Supporting Evidence</b>   | Date | Signature |
| SE0201     | Standard operational reports   |      |           |
| SE0202     | Minutes of meetings  |      |           |

|   |   |      |           |
|---|---|------|-----------|
|   | <b>Contextualised Workplace Knowledge</b> | Date | Signature |
| 1 | Data capturing and reporting systems      |      |           |
| 2 | HR policies and procedures                |      |           |
| 3 | Operational control standards             |      |           |

|  |   |      |           |
|--|---|------|-----------|
|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
|--|---|------|-----------|

**143905000-WM-03, Attend to operational target- and standard-setting processes in a contact centre environment, NQF Level 5, Credits 13**

|            |  |      |           |
|------------|--|------|-----------|
| WM-03-WE01 | Assist and observe an experienced person with the managing and controlling of target - and standard - setting procedures for a minimum period of one week  |      |           |
|            | <b>Scope Work Experience</b>   | Date | Signature |
| WA0101     | Assist with and observe the execution of a range of activities related to operational target- and standard-setting   |      |           |
| WA0102     | Assist with and observe general interaction, reporting and communication with other departments on matters related to operational planning   |      |           |
|            | <b>Supporting Evidence</b>   | Date | Signature |
| SE0101     | Report by mentor   |      |           |
| WM-03-WE02 | Attend to operational target - and standard - setting for a period of three weeks under the direct supervision of an experienced contact centre management staff member  |      |           |
|            | <b>Scope Work Experience</b>   | Date | Signature |
| WA0201     | Attend to operational planning activities, such as defining operational objectives, estimation and formulation of targets and standards, estimation of resources requirements, development of operational plans, evaluation of performance levels against set targets, and formulation of remedial actions to address areas of non-conformance |      |           |
| WA0202     | Attend to the interpretation and alignment of operational processes, targets and standards with service level agreement deliverables   |      |           |
| WA0203     | Attend to the management of service level agreement processes, risk management, performance evaluation, and corrective actions   |      |           |
| WA0204     | Attend to general interaction, reporting and communication with persons in managerial positions  |      |           |

|        |   |      |           |
|--------|---|------|-----------|
| WA0205 | Adhere to workplace policies and procedures related to operational planning and delegations   |      |           |
| WA0206 | Attend at least four meetings on operational reporting and planning and present at least one report on operational targets and standards at a meeting |      |           |
|        | <b>Supporting Evidence</b>  | Date | Signature |
| SE0201 | Operational reports   |      |           |
| SE0202 | Minutes of meetings   |      |           |

|   |   |      |           |
|---|---|------|-----------|
|   | <b>Contextualised Workplace Knowledge</b>           | Date | Signature |
| 1 | Operational targets and quality standards           |      |           |
| 2 | Standard workplace procedures                       |      |           |
| 3 | Personnel management policies, procedures and codes |      |           |

|  |   |      |           |
|--|---|------|-----------|
|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
|--|---|------|-----------|

**143905000-WM-04, Attend to team leadership and first-line discipline for an operational unit in a contact centre at supervisory level, NQF Level 4, Credits 8**

|            |  |      |           |
|------------|--|------|-----------|
| WM-04-WE01 | Assist and observe an experienced person attending to team leadership and first-line discipline for a period of one week |      |           |
|            | <b>Scope Work Experience</b>   | Date | Signature |
| WA0101     | Assist with and observe the team leadership and supervisory activities   |      |           |

|            |  |      |           |
|------------|--|------|-----------|
| WA0102     | Assist with and observe general interaction, reporting and communication with other departments  |      |           |
|            | <b>Supporting Evidence</b>   | Date | Signature |
| SE0101     | Report by mentor   |      |           |
| WM-04-WE02 | Attend to team leadership and first-line discipline under the direct supervision of an experienced contact centre management staff member for a period of two weeks      |      |           |
|            | <b>Scope Work Experience</b>   | Date | Signature |
| WA0201     | Attend to supervisory activities such as first-line discipline, target setting and performance evaluation, resolution of grievances, administration of personnel records |      |           |
| WA0202     | Attend to general interaction, reporting and communication with other departments  |      |           |
|            | <b>Supporting Evidence</b>   | Date | Signature |
| SE0201     | Personnel reports  |      |           |
| SE0202     | Minutes of meetings  |      |           |
| SE0203     | Operational reports  |      |           |

|   | <b>Contextualised Workplace Knowledge</b>           | Date | Signature |
|---|---|------|-----------|
| 1 | Operational targets and quality standards           |      |           |
| 2 | Standard workplace procedures                       |      |           |
| 3 | Personnel management policies, procedures and codes |      |           |
| 4 | Document flow and control                           |      |           |

|  |   |      |           |
|--|---|------|-----------|
|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
|--|---|------|-----------|

**143905000-WM-05, Attend to personnel management processes in a contact centre environment within the delegated functions of line management, NQF Level 5, Credits 16**

|            |   |      |           |
|------------|---|------|-----------|
| WM-05-WE01 | Assist and observe an experienced line manager responsible for personnel management and control for a period of two weeks   |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0101     | Assist with and observe the execution of personnel planning, management and control   |      |           |
| WA0102     | Assist with and observe the execution of industrial relations management and control  |      |           |
| WA0103     | Assist with and observe the execution of personnel performance and training management and control  |      |           |
| WA0104     | Assist with and observe general interaction, reporting and communication with other departments   |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0101     | Report by mentor  |      |           |
| WM-05-WE02 | Attend to personnel management and control procedures for a period of four weeks under the direct supervision of an experienced contact centre management staff member  |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0201     | Attend to personnel management and control activities such as workforce planning, shift management and handover procedures, personnel cost control, personnel records and administration  |      |           |
| WA0202     | Attend to industrial relations management and control activities such as the institution and enforcement of discipline, shop floor dispute and conflict resolutions, enforcement of codes of conduct, and industrial relations administration |      |           |

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|--------|---|------|-----------|
| WA0203 | Attend to personnel performance and training management, and control activities such as job analysis, performance agreements, performance interviews, recruitment and selection, training schedules and budgets, evaluation of the impact of training, training provider selection, and training administration |      |           |
| WA0204 | Attend to general interaction, reporting and communication with other departments   |      |           |
|        | <b>Supporting Evidence</b>  | Date | Signature |
| SE0201 | Operational reports   |      |           |
| SE0202 | Minutes of meetings   |      |           |
| SE0203 | Personnel records   |      |           |

|   |   |      |           |
|---|---|------|-----------|
|   | <b>Contextualised Workplace Knowledge</b>           | Date | Signature |
| 1 | Operational targets and quality standards           |      |           |
| 2 | Standard workplace procedures                       |      |           |
| 3 | Personnel management policies, procedures and codes |      |           |

|  |   |      |           |
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|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
|--|---|------|-----------|

**143905000-WM-06, Attend to customer and supplier relations management processes in a contact centre environment, NQF Level 6, Credits 16**

|            |   |      |           |
|------------|---|------|-----------|
| WM-06-WE01 | Assist with and observe customer and supplier relations management activities for a period of two weeks |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |

|            |   |      |           |
|------------|---|------|-----------|
| WA0101     | Assist with and observe the administration of supplier service level agreement and customer/client/supplier communication   |      |           |
| WA0102     | Assist with and observe general interaction, reporting and communication  |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0101     | Report by mentor  |      |           |
| WM-06-WE02 | Perform customer and supplier relations' management activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks   |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0201     | Attend to administrative management activities of supplier service level agreements, such as operational planning, monitoring and controlling of delivery standards and targets, data administration and reporting, business requirements for the supplier service level agreement, generation and presentation of service level agreement reports, validation of claims and resolution reports |      |           |
| WA0202     | Attend to customer/client/supplier communication related activities, such as satisfaction surveys, chair meetings and present reports, information sharing notices, stakeholder briefing, complaints and compliments management   |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0201     | Operational reports   |      |           |
| SE0202     | Minutes of meetings   |      |           |

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|   | <b>Contextualised Workplace Knowledge</b> | Date | Signature |
| 1 | Operational targets and quality standards |      |           |
| 2 | Standard workplace procedures             |      |           |

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|---|---|--|--|
| 3 | Supplier service level agreement management policies and procedures |  |  |
|---|---|--|--|

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|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
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**143905000-WM-07, Assure quality standards in a contact centre environment, NQF Level 5, Credits 16**

|            |   |      |           |
|------------|---|------|-----------|
| WM-07-WE01 | Assist with and observe quality management activities for a period of two weeks   |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0101     | Assist with and observe the administration of supplier service level agreement and customer/client/supplier communication   |      |           |
| WA0102     | Assist with and observe general interaction, reporting and communication  |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0101     | Report by mentor  |      |           |
| WM-07-WE02 | Perform quality assurance activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks   |      |           |
|            | <b>Scope Work Experience</b>  | Date | Signature |
| WA0201     | Attend to quality assurance activities, such as calibration of calls, monitoring compliance with business processes and customer process, monitoring and assuring output service delivery quality standards, conducting quality reporting and compiling action plans, conducting internal quality auditing, preparing for external quality auditing, conducting output services, benchmarking and reporting |      |           |
|            | <b>Supporting Evidence</b>  | Date | Signature |
| SE0201     | Quality reports   |      |           |

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|--------|---------------------|--|--|
| SE0202 | Minutes of meetings |  |  |
|--------|---------------------|--|--|

|   | <b>Contextualised Workplace Knowledge</b> | Date | Signature |
|---|---|------|-----------|
| 1 | Operational targets and quality standards |      |           |
| 2 | Standard workplace procedures             |      |           |
| 3 | Quality policies and procedures           |      |           |

|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
|--|---|------|-----------|
|  |   |      |           |

**143905000-WM-08, Attend to process and technology efficiency management processes in a contact centre environment, NQF Level 5, Credits 16**

|            |  |      |           |
|------------|--|------|-----------|
| WM-08-WE01 | Assist with and observe process and technology efficiency management activities for a period of two weeks  |      |           |
|            | <b>Scope Work Experience</b>   | Date | Signature |
| WA0101     | Assist with and observe the administration of process and technology efficiency management activities for a period of two weeks  |      |           |
| WA0102     | Assist with and observe general interaction, reporting and communication   |      |           |
|            | <b>Supporting Evidence</b>   | Date | Signature |
| SE0101     | Report by mentor   |      |           |
| WM-08-WE02 | Perform process and technology efficiency management activities under the direct supervision of an experienced contact centre management staff member for a period of four weeks |      |           |

|        | <b>Scope Work Experience</b>   | Date | Signature |
|--------|--|------|-----------|
| WA0201 | Attend to process and technology efficiency management activities, such as compiling systems generated reports for specific reporting purposes, analysing and interpreting data, compiling reports and presenting data   |      |           |
| WA0202 | Attend to the administration and management of customer contact and interaction processes such as the establishment of customer contact processes and managing the customer interaction systems  |      |           |
| WA0203 | Attend to the management of process and technology improvement processes or projects, such as defining improvement targets, controlling project budgets, monitoring and implementation of improvement plans, project administration and reporting, close out reviews |      |           |
|        | <b>Supporting Evidence</b>   | Date | Signature |
| SE0201 | MIS reports  |      |           |
| SE0202 | Minutes of meetings and reports  |      |           |
| SE0203 | Improvement plans and documentation  |      |           |

|   | <b>Contextualised Workplace Knowledge</b> | Date | Signature |
|---|---|------|-----------|
| 1 | Operational targets and quality standards |      |           |
| 2 | Standard workplace procedures             |      |           |
| 3 | Management Information Systems            |      |           |
| 4 | Workplace technology                      |      |           |

|  | <b>Additional Assignments to be Assessed Externally</b> | Date | Signature |
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