



Occupational Profile and Curriculum Summary

Presented for Comment

OFO code	143905
Related Occupation	Contact Centre Manager

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Curriculum Scope

The curriculum development process will investigate the design of an Occupational Certificate for Contact Centre Managers which addresses the need for a broad based qualification as well as a Part Qualification focused at Supervisory related roles in the contact centre industry.

Occupational Purpose

Contact Centre Managers manages and optimises quality contact centre operations and practices.

Occupational Tasks

Task 1 Managing and controlling costs of a contact centre

Task 2 Managing and controlling operational planning and the achievement of operational targets

Task 3 Managing personnel employed in a contact centre

Task 4 Managing customer and supplier relations

Task 5 Managing and assuring the achievement of contact centre quality standards

Task 6 Managing and controlling the efficiency of contact centre processes and technology

1. Managing and controlling costs of a contact centre

Unique Product or Service:

Financial targets are met

Occupational Responsibilities:

- i. Provide budgeting services
- ii. Read and interpret financial documents
- iii. Monitor and report on expense against budgets

Occupational Contexts:

Occupational Context 1: Contact Centre Supervisor

- i. Monitor costs against budgets for a operational unit in a contact centre

Occupational Context 2: Contact Centre Manager

- ii. Attend to standard financial control procedures in a contact centre environment

2. Managing and controlling operational planning and the achievement of operational targets

Unique Product or Service:

Operations targets and standards are achieved

Occupational Responsibilities:

- i. Maintain productive and effective work teams
- ii. Develop operational plans
- iii. Review and report on the achievement of operational targets
- iv. Manage service level agreements

Occupational Contexts:

Occupational Context 1: Contact Centre Supervisor

- i. Maintain productive and effective work teams for a operational unit in a contact centre

Occupational Context 2: Contact Centre Manager

- ii. Attend to operational target and standard setting processes in a contact centre environment

3. Managing personnel employed in a contact centre

Unique Product or Service:

People and staffing targets and standards are met

Occupational Responsibilities:

- i. Supervise personnel
- ii. Attend to personnel planning, management and control
- iii. Attend to IR management and control
- iv. Attend to performance and training management and control

Occupational Contexts:

Occupational Context 2: Contact Centre Manager

- i. Attend to line management personnel management processes in a contact centre environment

4. Managing customer and supplier relations

Unique Product or Service:

Sound customer and supplier relationships

Occupational Responsibilities:

- i. Establish and manage supplier service level agreements
- ii. Attend to customer/client/supplier communication
- iii. Control consumable items

Occupational Contexts:

Occupational Context 2: Contact Centre Manager

- i. Attend to customer and supplier relations management processes in a contact centre environment

5. Managing and assuring the achievement of contact centre quality standards

Unique Product or Service:

Quality standards are assured

Occupational Responsibilities:

- i. Assure the output of the service delivery by agents
- ii. Assure process efficiency, effectiveness and optimization
- iii. Assure customer service quality

Occupational Contexts:

Occupational Context 2: Contact Centre Manager

- i. Assure quality standards in a contact centre environment.

6. Managing and controlling the efficiency of contact centre processes and technology

Unique Product or Service:

Processes and technology are efficient

Occupational Responsibilities:

- i. Evaluate MIS reports and ensure system efficiency
- ii. Manage a customer contact process
- iii. Manage process and technology improvement projects

Occupational Contexts:

Occupational Context 2: Contact Centre Manager

- i. Attend to process and technology efficiency management processes in a contact centre environment

Curriculum Summary:

1. Knowledge Modules

Summary

Module	Title
Module 1	Introductory studies for Contact Centre Managers
Module 2	Communication
Module 3	Operational Supervision
Module 4	Operational management
Module 5	People Management
Module 6	Industrial Relations Management
Module 7	Contact Centre Technology, Systems and Processes
Module 8	Contact Centre Quality Management
Module 9	Supplier management
Module 10	Customer management

Module 1: Introductory studies for Contact Centre Managers

The main focus of the learning in this knowledge module is to:

- Introduce the learner to the contact centre industry, the business environment and concepts of time management, Quality and business ethics.
- Contact centre careers and qualifications
- Contact Centre business environment
- Safety, Health and Environmental protection
- Business ethics

Module 2: Communication

The main focus of the learning in this knowledge module is to:

- Introduce the Learner basic communication concepts

The learning will enable learners to demonstrate an understanding of:

- Basic principles of communication
- Formal business communication

- Non-verbal communication

Module 3: Operational Supervision

The main focus of the learning in this knowledge module is to:

- Introduce the learner to management principles and concepts that commonly apply to the supervisory function in an operation.

The learning will enable learners to demonstrate an understanding of:

- Introduction to supervision
- Supervising teams
- Performance Management
- Industrial Relations
- Workplace health and safety
- Quality assurance

Module 4: Operational management

The main focus of the learning in this knowledge module is to:

- Introduce the learner to management principles and concepts that commonly apply to the management of an operation.

The learning will enable learners to demonstrate an understanding of:

- Introduction to management
- Operational planning
- Organising
- Leading
- Controlling

Module 5: People Management

The main focus of the learning in this knowledge module is to:

- Introduce the learner to personnel management functions attended to by line management

The learning will enable learners to demonstrate an understanding of:

- Recruitment and selection
- Performance management
- Training management
- Facilitation, coaching and mentoring

Module 6: Industrial Relations Management

The main focus of the learning in this knowledge module is to:

- Introduce the learner to industrial relations management functions attended to by line management

The learning will enable learners to demonstrate an understanding of:

- Legislative overview
- The employment relationship and contract of employment
- Conduct management
- Capacity management
- Conflict management
- CCMA Dispute Resolution

Module 7: Contact Centre Technology, Systems and Processes

The main focus of the learning in this knowledge module is to:

- Introduce the learner to technology used in a contact centre as well as associated systems

The learning will enable learners to demonstrate an understanding of:

- Types of technology/systems and the application thereof
- Process flow and control

Module 8: Contact Centre Quality Management

The main focus of the learning in this knowledge module is to:

- Introduce the learner to quality management systems and the application of these to maintain quality standards

The learning will enable learners to demonstrate an understanding of:

- SABS Standard (BPS&O standard) and Benchmarking
- ISO Customer Contact Centre ISO standard

Module 9: Supplier management

The main focus of the learning in this knowledge module is to:

- Introduce the learner to a range of the management of suppliers to contact centres

The learning will enable learners to demonstrate an understanding of:

- Supplier selection
- Service Level Agreements

Module 10: Customer management

The main focus of the learning in this knowledge module is to:

- Introduce the learner to general customer service management concepts

The learning will enable learners to demonstrate an understanding of:

- Customer process management
- Customer Service Level Agreements/T&C

2. Practical Skills Modules

Summary

Module	Title
Module 1	Provide budgeting services
Module 2	Read and interpret financial documents
Module 3	Monitor and report on expense against budgets
Module 4	Maintain productive and effective work teams
Module 5	Develop operational plans
Module 6	Review and report on the achievement of operational targets
Module 7	Manage service level agreements
Module 8	Supervise personnel
Module 9	Attend to personnel planning, management and control
Module 10	Attend to IR management and control
Module 11	Attend to performance and training management and control
Module 12	Establish and manage supplier service level agreements
Module 13	Attend to customer/client communication
Module 14	Control consumable items
Module 15	Assure the output of the service delivery by agents
Module 16	Assure process efficiency, effectiveness and optimisation
Module 17	Assure customer service quality
Module 18	Evaluate MIS reports and ensure system efficiency
Module 19	Manage a customer contact process
Module 20	Manage process and technology improvement projects

Module 1: Provide budgeting services

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Provide inputs into the budgeting process
- Draw up an annual operational budget

Module 2: Read and interpret financial documents

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Read and evaluate financial targets
- Read financial statements and explain variables

Module 3: Monitor and report on expense against budgets

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Monitor and report on expense against budgets
- Forecast expenditure
- Formulate measure to reduce costs
- Control procurement within the budget

Module 4: Maintain productive and effective work teams

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Develop production targets for work teams
- Evaluate team outputs and quality standards

Module 5: Develop operational plans

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Propose targets to be included in an operation plan
- Develop a annual operational plan
- Define operational targets

Module 6: Review and report on the achievement of operational targets

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Short term review of targets
- Develop quarterly review plan
- Draft agent performance reports
- Collate operational reports from unit into a central plan
- Align operational targets and financial costs

Module 7: Manage service level agreements

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Read and interpret a SLA
- Define service delivery requirements

Module 8: Supervise personnel

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Attend to first line discipline
- Plan and monitor work schedules
- Administer employee records
- Coach employee

Module 9: Attend to personnel planning, management and control

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Develop an organisational structure
- Develop a workforce plan
- Draft a shift hand over procedure
- Plan for contingencies
- Draft personnel cost control schedule

Module 10: Attend to IR management and control

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Attend to shop floor discipline
- Attend to grievances
- Attend to capacity related problems
- Resolve conflict
- Respond to CCMA notices
- Prepare for CCMA mediation procedures
- Prepare for CCMA arbitration procedures

Module 11: Attend to performance and training management and control

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Conduct a recruitment interview
- Develop a performance agreement
- Conduct a performance appraisal
- Conduct a staff satisfaction survey
- Coordinate and management training

Module 12: Establish and manage supplier service level agreements

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Read and interpret supplier service level agreements
- Identify business requirements for the supplier service level agreement
- Generate and present service level agreement reports
- Validate claims and resolution reports

Module 13: Attend to customer/client/supplier communication

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Consumer/client satisfaction survey
- Chair meetings and deliver reports
- Stakeholder briefings and information sharing
- Compliments and complaints management

Module 14: Control consumable items

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Monitor and control consumable items
- Place orders
- Report writing

Module 15: Assure the output of the service delivery by agents

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Calibrate calls
- Output service delivery quality monitoring plan
- Conduct internal auditing procedures on output quality standards
- Prepare for external audits on output quality standards
- Develop and conduct output services benchmarking meetings and reports

Module 16: Assure process efficiency, effectiveness and optimisation

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Process quality monitoring plan
- Conduct internal auditing procedures on process quality standards
- Prepare for external audits on process quality standards
- Conduct benchmarking meetings and reports

Module 17: Assure customer service quality

The learning will enable learners to develop practical skills in a controlled or simulated environment to

- Customer service quality monitoring plan
- Conduct internal auditing procedures on customer service
- Prepare for external audits on customer service quality standards
- Develop and conduct customer service benchmarking meetings and reports

Module 18: Evaluate MIS reports and ensure system efficiency

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Access and evaluate standard MIS reports
- Define parameters and generate specific reports
- Draft systems specification requirements for business applications

Module 19: Define and manage a customer contact process

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Establish a customer contact process
- Manage the operational customer interaction system

Module 20: Manage process and technology improvement projects

The learning will enable learners to develop practical skills in a controlled or simulated environment to:

- Develop a project plan
- Implement the project plan
- Perform a project closeout evaluation

3. Work Experience Modules

Summary

Module	Title
Module 1	Monitor costs against budgets for a operational unit in a contact centre
Module 2	Attend to standard financial control procedures in a contact centre environment
Module 3	Maintain productive and effective work teams for a operational unit in a contact centre
Module 4	Attend to operational target and standard setting processes in a contact centre environment
Module 5	Attend to personnel management and first line discipline for a operational unit in a contact centre at supervisory level
Module 6	Attend to line management personnel management processes in a contact centre environment
Module 7	Attend to customer and supplier relation's management processes in a contact centre environment.
Module 8	Assure quality standards in a contact centre environment
Module 9	Attend to process and technology efficiency management processes in a contact centre environment

Module 1: Monitor costs against budgets for a operational unit in a contact centre

The learner will be required to:

- Observe and assist an experienced contact centre supervisor with a range of cost control activities
- Attend to a range of cost control activities under close supervision of an experience contact supervisor

Module 2: Attend to standard financial control procedures in a contact centre environment

The learner will be required to:

- Observe and assist an experienced contact centre manager with a range of financial management activities
- Attend to a range of financial management activities under close supervision of an experience contact centre manager

Module 3: Maintain productive and effective work teams for a operational unit in a contact centre.

The learner will be required to:

- Observe and assist an experienced contact centre supervisor with maintaining work processes and team outputs
- Attend to work processes and teams outputs under close supervision of an experienced contact centre supervisor

Module 4: Provide operational target and standard setting procedures in a contact centre environment.

The learner will be required to:

- Observe and assist an experienced contact centre manager with a range of operational targets and standard setting activities
- Attend to a range of operational targets and standard setting activities under close supervision of an experience contact centre manager

Module 5: Attend to personnel supervision and first line discipline for a operational unit in a contact centre

The learner will be required to:

- Observe and assist an experienced contact centre supervisor with a range of personnel management functions and activities
- Attend to a range of personnel management functions and activities under close supervision of an experience contact centre supervisor

Module 6: Provide personnel management services in a contact centre environment

The learner will be required to:

- Observe and assist an experienced contact centre manager with a range of personnel management activities
- Attend to a range of personnel management activities under close supervision of an experience contact centre manager

Module 7: Attend to customer and supplier relation's management processes in a contact centre environment

The learner will be required to:

- Observe and assist an experienced contact centre manager with a range of customer and supplier relation's management activities
- Attend to a range of customer and supplier relation's management activities under close supervision of an experience contact centre manager

Module 8: Assure quality standards in a contact centre environment

The learner will be required to:

- Observe and assist an experienced contact centre manager with a range of quality assurance activities
- Attend to a range of quality assurance activities under close supervision of an experience contact centre manager

Module 9: Attend to process and technology efficiency management processes in a contact centre environment

The learner will be required to:

- Observe and assist an experienced contact centre manager with a range of process and technology efficiency management activities
- Attend to a range of process and technology efficiency management activities under close supervision of an experience contact centre manager

Proposed structure of future qualifications

1. Occupational Certificate: Contact Centre Manager

Knowledge Modules

Module	Title
Module 1	Introductory studies for Contact Centre Managers
Module 2	Communication
Module 3	Operational Supervision
Module 4	Operational management
Module 5	People Management
Module 6	Industrial Relations Management
Module 7	Contact Centre Technology, Systems and Processes
Module 8	Contact Centre Quality Management
Module 9	Supplier management
Module 10	Customer management

Practical Skills Modules

Module	Title
Module 1	Provide budgeting services
Module 2	Read and interpret financial documents
Module 3	Monitor and report on expense against budgets
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Module 5	Develop operational plans
Module 6	Review and report on the achievement of operational targets
Module 7	Manage service level agreements
Module 8	Supervise personnel
Module 9	Attend to personnel planning, management and control
Module 10	Attend to IR management and control

Module 11	Attend to performance and training management and control
Module 12	Establish and manage supplier service level agreements
Module 13	Attend to customer/client communication
Module 14	Control consumable items
Module 15	Assure the output of the service delivery by agents
Module 16	Assure process efficiency, effectiveness and optimisation
Module 17	Assure customer service quality
Module 18	Evaluate MIS reports and ensure system efficiency
Module 19	Manage a customer contact process
Module 20	Manage process and technology improvement projects

Work Experience Modules

Module	Title
Module 2	Attend to standard financial control procedures in a contact centre environment
Module 4	Attend to operational target and standard setting processes in a contact centre environment
Module 6	Attend to line management personnel management processes in a contact centre environment
Module 7	Attend to customer and supplier relation's management processes in a contact centre environment.
Module 8	Assure quality standards in a contact centre environment
Module 9	Attend to process and technology efficiency management processes in a contact centre environment

2. Part Qualification: Occupational Certificate: Contact Centre Supervisor

Knowledge Modules

Module	Title
Module 1	Introductory studies for Contact Centre Managers
Module 2	Communication
Module 3	Operational Supervision

Module 7	Contact Centre Technology, Systems and Processes
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Practical Skills Modules

Module	Title
Module 1	Provide budgeting services
Module 3	Monitor and report on expense against budgets
Module 4	Maintain productive and effective work teams
Module 8	Supervise personnel
Module 14	Control consumable items

Work Experience Modules

Module	Title
Module 1	Monitor costs against budgets for a operational unit in a contact centre
Module 3	Maintain productive and effective work teams for a operational unit in a contact centre
Module 5	Attend to personnel management and first line discipline for a operational unit in a contact centre at supervisory level