Contact Centre Career and Skills Framework

Part One: Framework Overview

Final Version 1.0

**The Sector Skills Council for
IT • Telecoms • Contact Centres**

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1   About the Framework

1.1   Introduction

The Career and Skills Framework identifies a comprehensive set of contact centre competencies[1] linked to role and career routes a contact centre professional may pursue. It highlights the competencies required to acquire and retain customers, deliver exceptional customer service and manage effective contact centre operations. The Framework is delivered in three parts:

- **Part 1** *"Framework Overview"* provides the user with a broad understanding of how the Framework works

- **Part 2** *"Applying the Framework"* provides employers with advice on how to successfully apply the Framework within a contact centre

- **Part 3** *"Levels of Ability Explained"* provides the user with a detailed explanation of each of the competencies and associated levels of ability defined within the Framework

1.2   Framework objectives

The Framework has been developed to help the sector make a step change in the management and development of skills. The Framework is designed to:

- Provide employers, stakeholders and government with a simple mechanism for understanding the complex competencies required within contact centres

- Provide a frame of reference for employers and individuals to identify the competencies needed at each career level and thus drive the selection of relevant training programmes

- Help educators develop training curriculum in line with employer need

- Help government and stakeholders direct strategic investment and funding in the development of competencies to meet the real needs of the sector

1.3   The Framework and the National Occupational Standards

The Framework complements the National Occupational Standards (NOS) for Contact Centres in three ways:

- Each competency defined within the Framework has been cross-referenced to the skill definitions within the NOS for Contact Centres and, where relevant, the NOS definition has been included within the competency definition.

- Each level of ability (1-4) corresponds to a particular level within the NOS Statements of Competence. For example, level one in the Framework corresponds to level one and two in the Statements of Competence. This mapping continues as the ability levels ascend with level four in the Framework corresponding to level five in the Statements of Competence.

- Each role profile within the Framework maps onto an NOS level (for example, a customer service advisor would perform primarily NOS Level 2 activities).
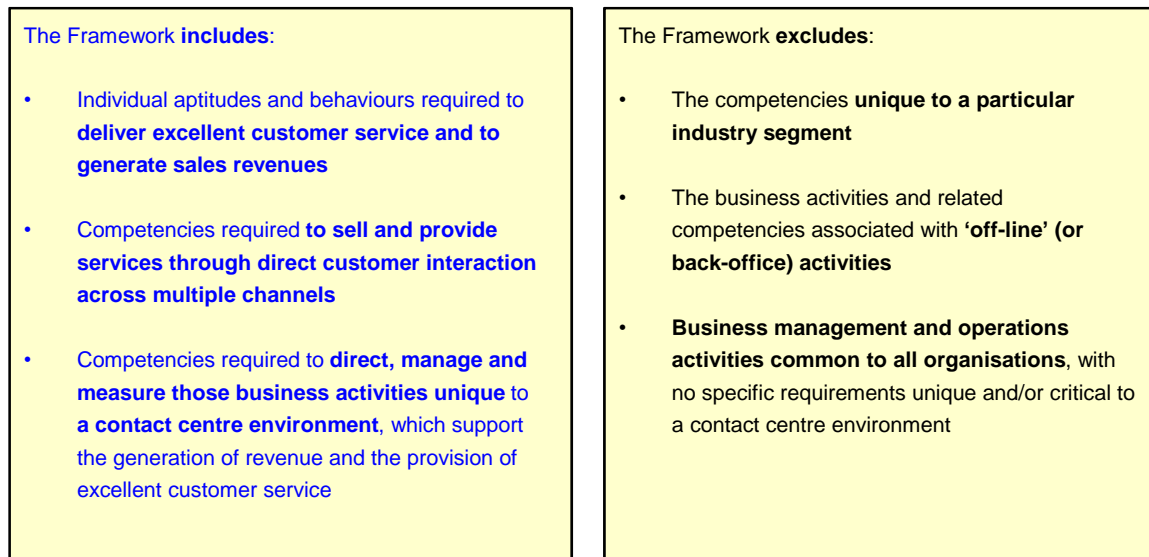
Links to the NOS for Contact Centres are explicit in the Levels of Ability definitions.

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[1] A **competency** is defined as a combination of knowledge, skills and behaviours

2 The Framework in a business context

2.1 Scope

The Framework identifies the 'on-line' (or front office) competencies required to support business activities within a contact centre environment.

The Framework **includes**:

• Individual aptitudes and behaviours required to **deliver excellent customer service and to generate sales revenues**

• Competencies required **to sell and provide services through direct customer interaction across multiple channels**

• Competencies required to **direct, manage and measure those business activities unique** to **a contact centre environment**, which support the generation of revenue and the provision of excellent customer service

The Framework **excludes**:

• The competencies **unique to a particular industry segment**

• The business activities and related competencies associated with **'off-line' (or back-office) activities**

• **Business management and operations activities common to all organisations**, with no specific requirements unique and/or critical to a contact centre environment

The diagram below illustrates the key areas of business activities that the Framework supports.
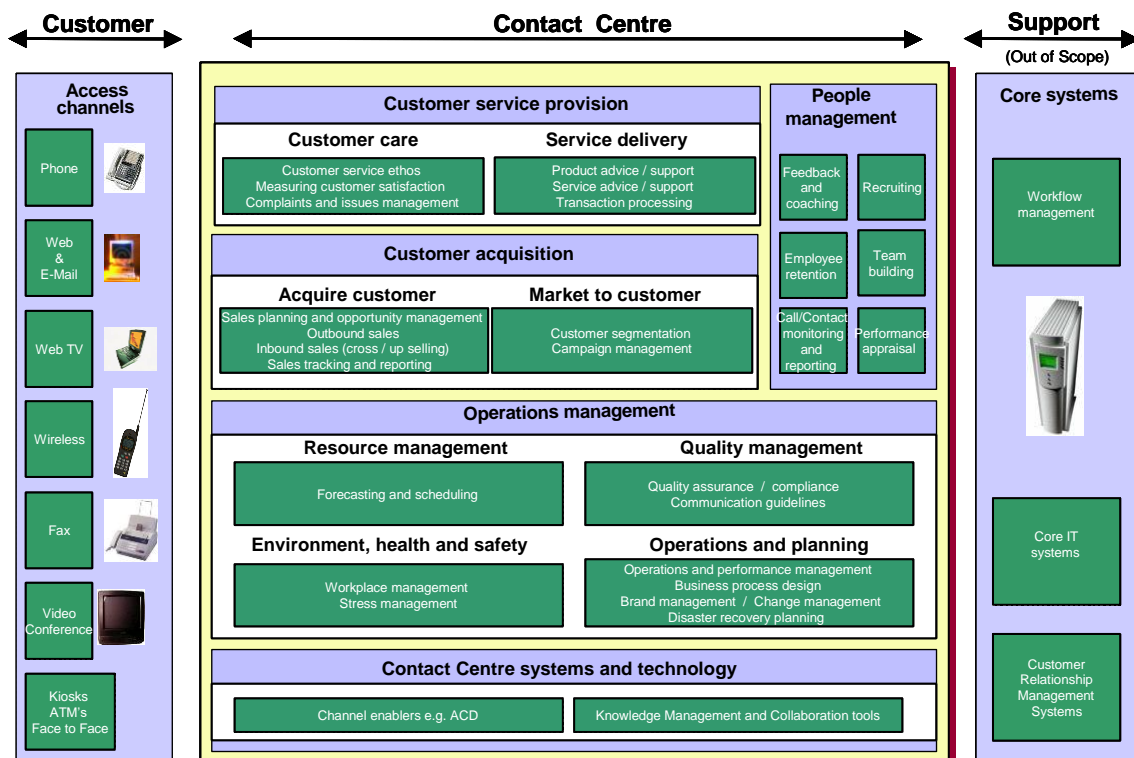
3   How it works

3.1   Framework structure

The Framework provides a simple-to-use model for describing the competencies a contact centre requires, based on three core concepts:
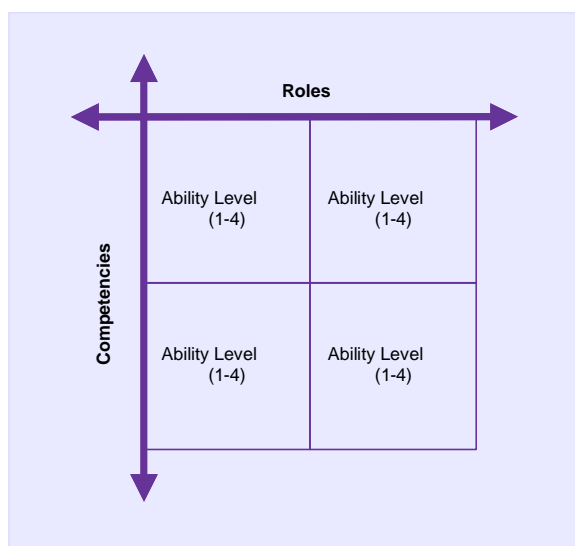
- Competencies
- Roles
- Levels of Ability

The vertical axis identifies the competencies required to perform successfully as a contact centre professional.

The horizontal axis identifies eleven generic roles, ranging from a new entrant through to Contact Centre Manager.

For each competency identified in the Framework, four unique levels of ability have been defined based on a set of guidelines. See Section 3.3 ("*Levels of Ability*").

3.2   Competencies

A competency comprises the knowledge, skills and behaviours necessary for the effective execution of business activities. The competencies included in the Framework identify the cross-industry competencies required by the front office and supporting business activities within a contact centre.

The competencies are divided into the following categories:

Customer service provision	The competencies required to provide outstanding customer service
Customer acquisition	The competencies required to sell products and services and acquire new customers
Operations management	The competencies required to manage the day-to-day running of a contact centre
Technology skills	The skills required to operate contact centre technology, systems and tools
Business skills	The professional and interpersonal skills required to develop successfully as a contact centre professional
Personal aptitudes	The essential behaviours and characteristics required across all career levels

Categories, Subcategories and Competencies

The following table displays a full list of all the competencies that comprise the Framework.

Category	Subcategory	Competency
A Customer service provision	1 Customer care	1.1 Customer service ethos
		1.2 Measuring customer satisfaction
		1.3 Complaints and issues management
	2 Service delivery	2.1 Product advice / support
		2.2 Service advice / support
		2.3 Transaction processing
B Customer acquisition	1 Market to customer	1.1 Customer segmentation
		1.2 Campaign management
	2 Acquire customer	2.1 Sales planning and opportunity management
		2.2 Outbound sales
		2.3 Inbound sales (cross / up selling)
		2.4 Sales tracking and reporting
C Operations management	1 Forecasting and scheduling	1.1 Forecasting
		1.2 Scheduling*
	2 People management	2.1 Recruiting*
		2.2 Team building
		2.3 Feedback and coaching
		2.4 Call / contact monitoring and reporting*
		2.5 Performance appraisal
		2.6 Employee retention
	3 Quality management	3.1 Quality assurance
		3.2 Compliance*
		3.3 Communication guidelines (scripting)
	4 Environment, health and safety	4.1 Workplace management*
		4.2 Stress management
	5 Operations and planning	5.1 Operations and performance management
		5.2 Business process design
		5.3 Brand management
		5.4 Change management
		5.5 Disaster recovery planning
D Technology skills	1 Using technology	1.1 Telephony
		1.2 PC and keyboard
		1.3 Electronic communications
	2 Using contact centre systems	2.1 Automatic Call Distributor
		2.2 Computer Telephony Integration
		2.3 Web Telephony Integration
		2.4 Knowledge Management
		2.5 Integrated Voice Response
E Business skills	1 Communication skills	1.1 Speaking
		1.2 Listening
		1.3 Writing
		1.4 Linguistic (as required)
	2 Professional skills	2.1 Problem solving
		2.2 Entrepreneurship
		2.3 Team-working
		2.4 Facilitation
		2.5 Conflict management
		2.6 Negotiation and influence
		2.7 Attention to detail
		2.8 Decision making / sound judgement
		2.9 Numeracy
		2.10 Industry awareness
		2.11 Relationship building
		2.12 Leadership
F Personal aptitudes	1 Personal aptitudes	1.1 Integrity
		1.2 Initiative
		1.3 Self-motivation / stamina
These aptitudes highlight essential characteristics required in all contact centre roles. Levels of ability have nominally been assigned to reflect how behaviours may differ depending on the level of complexity of the role.		1.4 Credibility
		1.5 Confidence
		1.6 Positive attitude
		1.7 Tolerance*
		1.8 Learning ability
		1.9 Empathy

All of the competencies outlined here are described in detail in the Career and Skills Framework Part 3 *"Levels of Ability Explained"*.

Please note:
This list is intended to be as comprehensive as possible within the boundaries of the Framework. It is not, however, expected that employers will require their workforce to display all of these competencies. Employers are encouraged to choose and adapt these competencies as appropriate to their business need.

* denotes an obligation for the employer to perform certain activities to meet legal requirements

3.3   Roles

Eleven generic roles have been identified which are applicable across the contact centre sector.

It is recognised that these roles do not represent an exhaustive list but rather an example of the variety of roles available across the industry. Indeed, the jobs of an individual may comprise a number of roles, for example: a Product Specialist or Team Leader/Manager is likely to also spend a portion of their time performing the role of Coach.

The following roles are utilised within the Framework:

Role	Description
New Entrant (pre training)	This profile of a new recruit identifies the specific competencies required prior to induction training for a sales or service advisor role within a contact centre.
Customer Service Advisor	Acts as an initial point of contact for customers, fulfilling routine requests, responding to enquiries and performing routine transactions.
Sales Advisor	Contacts potential customers and promotes appropriate products or services to close a sale.
Experienced Service Advisor	Acts as a point of contact for customers, performs routine and complex transactions and ensures value added service is provided to the customer.
Experienced Sales Advisor	Identifies sales opportunities, contacts potential customers, promotes the features and benefits of products or services to close the sale.
Product Specialist	Acts as a point of contact for customers with complex product queries and performs complex transactions.
Customer Service Team Leader	Directs, manages and measures the performance of the customer service team. Acts as first escalation point for customer issues and complaints.
Sales Team Leader/Manager	Directs, manages and measures the performance of the sales team. Acts as first escalation point for customer issues and complaints.
Coach (for Advisors)	Provides on-the-job coaching to enable advisors to complete difficult or complex tasks.
Scheduling / Resource Manager	Forecasts and schedules contact centre resources to meet call/contact volumes and operational requirements.
Operations / Contact Centre Manager	Sets the direction for the contact centre and builds an environment that enables the contact centre to meet its goals. Makes decisions regarding day-to-day business operations and service delivery.

3.4 Levels of ability

People are required to exercise competencies at different levels depending on their role and responsibility. In the Framework, four levels of ability have been defined for each competency.

Each level of ability identifies the activities and supporting knowledge that an individual should demonstrate. The levels of ability are additive, each one building on the other. For example, if an employee is expected to perform at level two they should also be demonstrating their ability to perform related level one activities.

The table below provides a guide by which each unique level of ability has been defined. Please note, this is a guide, not an exhaustive list, providing a summary of the generic types of activities, knowledge and understanding required at each level of ability. In addition, it is not expected that each activity in this guide will be performed in a given instance.

Levels of ability guidelines

Learning (1)	**Recognises individual responsibilities, performs basic tasks**
	• Gathers / provides information
	• Identifies and adheres to individual or organisational requirements
	• Uses basic features of contact centre systems
Performing (2)	**Performs a variety of activities with minimal supervision, contributes ideas and knowledge**
	• Performs routine activities
	• Uses advanced features of contact centre systems
	• Contributes to own and team performance
Enhancing (3)	**Handles complex tasks, evaluates performance, provides recommendations for improvements**
	• Develops plans to meet organisational requirements
	• Analyses data and trends and provides recommendations for improvements
Leading (4)	**Sets direction, optimises performance, acts as a role model**
	• Enhances own and organisational performance
	• Defines business requirements for contact centre systems
	• Sets an example for others to follow and inspires others to achieve their best

The levels of ability for the competency **'Customer service ethos'** are included as an example below.

Learning (1)	**Understands customer needs**
	• Interacts with customer in a helpful and sensitive manner
	• Focuses on addressing customer query
Performing (2)	**Takes ownership of customer enquiries and problems**
	• Builds a trusting relationship with the client
	• Identifies issues that could affect the efficiency of service delivery
	• Ensures response time and resolution time objectives are met
Enhancing (3)	**Adopts customer perspective in all interactions**
	• Solicits informal feedback to improve quality of service
	• Follows up with customers, where appropriate, to ensure efficiency of product/service recommendations
Leading (4)	**Balances customer needs and contact acentre requirements**
	• Fosters an environment of customer service
	• Builds long term perspective in developing customer relations

3.5 Example of the Contact Centre Career and Skills Framework

The matrix below is the Framework for the 'Customer service provision' competency category. The full Career and Skills Framework is provided in *Appendix One 'The Career and Skills Framework'*.

The Framework provides a high level view of all the competencies that each role should display and to what level of ability.

								Roles and Responsibilities					
Category	**Subcategory**	**Competency**	**New Entrant (pre-training)**	**Customer Service Advisor**	**Sales Advisor**	**Experienced Customer Service Advisor**	**Experienced Sales Advisor**	**Product Specialist**	**Customer Service Team Leader / Manager**	**Sales Team Leader / Manager**	**Coach (for Advisors)**	**Resource / Scheduling Manager**	**Operations / Contact Centre Manager**
	1 Customer care												
A Customer service provision		**1.1** Customer service ethos	1	2	2	3	3	3	4	4	4	4	4
		1.2 Measuring customer satisfaction		1	1	2	1	2	3	3	3		4
		1.3 Complaints and issues management		2	2	3	3	4	4	4	4		4
	2 Service delivery	**2.1** Product advice / support		2	2	3	3	4	4	4	3		4
		2.2 Service advice / support		2	1	3	2	3	4	4	4		4
		2.3 Transaction processing		2	2	3	3	3	4	4	3	4	4

Key			
	1	**Learning**	Recognises individual responsibilities and performs basic tasks
	2	**Performing**	Performs a variety of actions with minimal supervision and contributes ideas and knowledge
	3	**Enhancing**	Handles complex tasks, evaluates performance and provides recommendations for improvements
	4	**Leading**	Sets direction, optimises performance and acts as a role model
			Detailed explanations of the level of ability for each competency is available within Part 3 'Levels of Ability Explained'

4   Applying the Framework

4.1   Using the Framework

Employers are likely to use the Framework in several ways, for example:

- To measure the competencies employees have against those required, and thus identify competency gaps

- To develop training programmes mapped to national and government sponsored learning and development pathways

- To identify a range of career development pathways within their contact centres

- To provide a set of competency-based job profiles to support effective recruitment and selection

- To support competency-based performance management and appraisal processes

4.2   Tailoring the Framework

The Framework is intended to be a flexible model that each employer can mould and adapt to meet the needs of their business, whether that is in using the Framework to complement an existing competency model or in using it as a baseline when developing a new competency model.   In either case, employers may want to tailor the Framework to add or remove competencies required by their unique business environment.

The Framework has been designed to be useful to all contact centre employers regardless of industry sector and for many employers the competencies included within the Framework will be considered comprehensive. Others, however, may wish to include more detail in a range of industry-specific areas, and may wish to supplement the existing competencies to explicitly include this full range of activities.

Four steps have been identified for employers who wish to tailor the Framework:

STEP 1 **Identify relevant competencies**	Where appropriate delete, amend or add competencies to meet your organisation's requirements.
STEP 2 **Identify role profiles for your own organisation**	Match the roles within your organisation to the generic roles defined within the Framework. Where appropriate amend, add or delete the roles defined within the Framework.
STEP 3 **Link competencies to roles**	Link your organisation's role profiles to the competencies that you have selected from the Framework.
STEP 4 **Identify target levels of ability for each role**	Levels of ability (1-4) have been defined for each competency contained in the Framework. Some of these levels of ability may need to be amended to reflect your organisation's requirements.

Appendix One: The Career and Skills Framework

Category	Subcategory	Competency	New Entrant (pre-training)	Customer Service Advisor	Sales Advisor	Experienced Customer Service Advisor	Experienced Sales Advisor	Product Specialist	Customer Service Team Leader / Manager	Sales Team Leader / Manager	Coach (for Advisors)	Resource / Scheduling Manager	Operations / Contact Centre Manager
A Customer service provision	**1** Customer care	**1.1** Customer service ethos	1	2	2	3	3	3	4	4	4	4	4
		1.2 Measuring customer satisfaction		1	1	2	1	2	3	3	3		4
		1.3 Complaints and issues management		2	2	3	3	4	4	4	4		4
	2 Service delivery	**2.1** Product advice / support		2	2	3	3	4	4	4	3		4
		2.2 Service advice / support		2	1	3	2	3	4	4	4		4
		2.3 Transaction processing		2	2	3	3	3	4	4	3	4	4
B Customer acquisition	**1** Market to customer	**1.1** Customer segmentation		1	1	2	2	3	3		3	2	4
		1.2 Campaign management		1	2	1	2	2		3	2	4	4
	2 Acquire customer	**2.1** Sales planning and opportunity management				1		2	3		3		4
		2.2 Outbound sales			2		3	3		4	4		
		2.3 Inbound sales (cross / up selling)		2	2	3	3	3	4	4	4		
		2.4 Sales tracking and reporting						1			3	2	4
C Operations management	**1** Forecasting and scheduling	**1.1** Forecasting							1	1		4	4
		1.2 Scheduling*							2	2		4	4
	2 People management	**2.1** Recruiting*							2	2		3	4
		2.2 Team building		1	1	2	2	2	3	3	3	3	4
		2.3 Feedback and coaching		1	1	2	2	2	3	3	3	3	4
		2.4 Call / Contact monitoring and reporting*		1	1	1	1	1	3	3	3		4
		2.5 Performance appraisal		2	2	2	2	2	3	3	2	3	4
		2.6 Employee retention		1	1	2	2	2	3	3	2	3	4
	3 Quality management	**3.1** Quality assurance		2	2	2	2	2	3	3	3	3	4
		3.2 Compliance*		2	2	2	2	2	3	3	3	3	4
		3.3 Communication guidelines (scripting)		2	2	2	2	3	4	4	3		
	4 Environment, health and safety	**4.1** Workplace management*		2	2	2	2	2	2	2	2	2	4
		4.2 Stress management		2	2	2	2	2	3	3	3	4	4
	5 Operations and planning	**5.1** Operations and performance management		1	1	1	1	2	3	3	3	3	4
		5.2 Business process design		1	1	2	2	2	3	3	2	3	4
		5.3 Brand management		2	2	2	2	3	3	3	3	3	4
		5.4 Change management		1	1	2	2	2	3	3	2	3	4
		5.5 Disaster recovery planning		1	1	1	1	1	2	2	1	2	4
D Technology skills	**1** Using technology	**1.1** Telephony	1	2	2	2	2	2	3	3	3		4
		1.2 PC and keyboard	1	2	2	3	3	3	3	3	3	4	4
		1.3 Electronic communications		1	1	2	2	2	3	3	2	3	4
	2 Using contact centre systems	**2.1** Automatic Call Distributor							2	2		3	4
		2.2 Computer Telephony Integration		2	2	2	2	2	2	2	2	3	4
		2.3 Web Telephony Integration		1	1	2	2	2	2	2	2		4
		2.4 Knowledge Management		2	2	2	2	3	3	3	3	3	4
		2.5 Integrated Voice Response										3	4
E Business skills	**1** Communication skills	**1.1** Speaking	1	2	2	4	4	4	4	4	4	4	4
		1.2 Listening	1	2	2	4	4	4	4	4	4	4	4
		1.3 Writing	1	2	2	3	3	3	4	4	4	4	4
		1.4 Linguistic (as required)		3	3	3	3	3	3	3	4		
	2 Professional skills	**2.1** Problem solving		2	2	3	3	3	4	4	4	4	4
		2.2 Entrepreneurship		2	2	2	2	3	3	3	3	3	4
		2.3 Team-working	1	2	2	3	3	3	4	4	4	4	4
		2.4 Facilitation		1	1	2	2	2	3	3	3	3	4
		2.5 Conflict management		2	2	2	2	2	3	3	3	3	4
		2.6 Negotiation and influence	1	2	2	3	3	3	3	3	3	4	4
		2.7 Attention to detail	1	2	2	3	3	4	4	4	4	4	4
		2.8 Decision making / sound judgement		2	2	3	3	3	4	4	3	4	4
		2.9 Numeracy	1	2	2	2	2	3	4	4	3	4	4
		2.10 Industry awareness	1	2	2	2	2	3	3	3	2	4	4
		2.11 Relationship building	1	2	2	3	3	3	4	4	3	4	4
		2.12 Leadership		2	2	2	2	2	3	3	3	3	4
F Personal aptitudes	**1** Personal aptitudes	**1.1** Integrity	1	3	3	3	3	3	4	4	4	4	4
		1.2 Initiative	1	2	2	3	3	3	4	4	3	4	4
		1.3 Self-motivation / stamina	1	2	2	3	3	3	4	4	3	4	4
		1.4 Credibility	1	2	2	3	3	3	4	4	4	4	4
		1.5 Confidence	1	2	2	3	3	3	4	4	4	4	4
		1.6 Positive attitude	1	3	3	3	3	3	4	4	4	4	4
		1.7 Tolerance*	1	2	2	3	3	4	4	4	4	4	4
		1.8 Learning ability	1	2	2	3	3	3	3	3	3	3	4
		1.9 Empathy	1	3	3	4	4	4	4	4	4	4	4

These aptitudes highlight essential characteristics required in all contact centre roles. Levels of ability have nominally been assigned to reflect how behaviours may differ depending on the level of complexity of the role.

Key

1	**Learning**	Recognises individual responsibilities and performs basic tasks
2	**Performing**	Performs a variety of actions with minimal supervision and contributes ideas and knowledge
3	**Enhancing**	Handles complex tasks, evaluates performance and provides recommendations for improvements
4	**Leading**	Sets direction, optimises performance and acts as a role model

Detailed explanations of the level of ability for each competency is available within Part 3 'Levels of Ability Explained'